

**PENNSYLVANIA TREASURY DEPARTMENT**  
**PROCUREMENT SOLE SOURCE JUSTIFICATION**

Bureau: Board of Finance and Revenue

Contractor: Thomson Reuters Westlaw

Agency Purchase Requisition No. \_\_\_\_\_

A) Reason(s) for Sole Source Procurement:

- Only a single contractor is capable of providing the service.
  - Only known source; similar services/commodities are not available from another contractor.
  - Service must be compatible with existing equipment.
- A federal or state statute or federal regulation exempts the service from the competitive procedure and there is appropriate justification to do so.
- It is clearly not feasible to award the contract for services on a competitive basis.
- The services are to be provided by attorneys or litigation consultants selected by the Department.
- The services are to be provided by expert witnesses.
- The services involve the repair, modification or calibration of equipment, and they are to be performed by the manufacturer of the equipment or by the manufacturer's authorized dealer, provided the contracting officer determines that bidding is not appropriate under the circumstances.
- The contract is for financial or investment experts to be used and selected by the Department.
- The contract is for supplies or services is in the best interest of the Commonwealth.
- Part I, Chapter I of the Pennsylvania Procurement Handbook issued by the Department of General Services under the authority of Commonwealth Procurement Code, 62 P.S. Section 101 *et seq.*, exempts Treasury from the policies, procedures, and guidelines of the handbook for the licensing of specialized computer software.

B) Briefly describe the supply or service item you are requesting and its function.

Thomson Reuters Westlaw (TR) provides BFR Briefers and Attorneys with updated laws and information needed to complete briefs to assist taxpayers and present to the Board Members.

- C) Describe the unique features/compatibility of the supply, service or construction item that precludes competitive procurement.

TR provides the most up to date information in the fastest timeframe.

- D) What research has been done to verify the contractor as the only known source?

BFR receives information from other contractors regarding the same resources. BFR has received services and documents from TR for many years and receives discounted prices for doing so and being a State Agency.

- E) Does the contractor have any distributors, dealers, resellers, etc., that sell the supply, service, or construction item?

Unknown.

- F) Must this supply, service or construction item be compatible with present inventory/equipment or in compliance with a manufacturer's warranty or existing service agreement? If yes, please explain.

Yes - TR sends updates on books that BFR already has.

- G) If this is an initial procurement, what are the future consequences of the procurement? That is, once this procurement is approved and processed, what additional upgrades/additions/supplies/ services/construction, etc., are anticipated/projected over the useful life of this item?

BFR has used TR services for many years and have not inquired any additional services in the past.

- H) If this is an upgrade, addition, alteration, etc., to an existing service? How was the original service procured (sole source or competitive)? What additional, related, sole source procurements have occurred since the initial procurement? Please identify the previous purchase order or contract number(s).

BFR has reduced the amount of services needed. This contract is less than previous years.

- I) How has this service been procured in the past? (Competitive sealed bidding, competitive sealed proposals, sole source, other). Please provide document numbers.

Yes - Sole Source Approval was provided in 2017. Document numbers unavailable.

- J) What are the consequences of not procuring this specific supply or service item?

- K) How long has the agency known that the supply or service was needed, and why wasn't the contract process started earlier?

Contracted is updated every 3 years and up for renewal. This year we have reduced the amount of services needed. TR agent was working to get our renewal dates on the same timeframe which took additional time to receive.

- L) If timing is a factor, who established the time frame and why?

The previous contract had multiple renewal timeframes. BFR has renewed the contracted to ensure all services are on the same renewal period.

- M) What are the consequences of not procuring this specific service within the established time frame?

Contract could become void and BFR current services could be discontinued.

- N) List any other information relevant to the acquisition of this service.

The renewed contract and pricing we received is less than years before. BFR briefers have used other resources to reduce the cost of the TR contract.