



Max Bricka, CPSM
PURCHASING AGENT / DIRECTOR

5/19/16

Williamson County Commissioners Court

Re: Sole Source recommendation for Norex, Inc.

Dear County Judge and Commissioners,

Recently our county IT Department made a request for qualifying the **sole source membership renewal for Norex, Inc. Norex is a knowledge sharing consortium of Information Systems and Information Technology Departments that facilitates sharing between various groups. Their service is vendor free, unbiased information that is not available from any other company.**

After reviewing all documentation requested and submitted, **I recommend qualifying this request as a sole source purchase per Texas Local Government Code sections 262.003 (a) and 262.024 (a) (7).**

The process has included the following:

- Public posting of an RFI in BidSync for 14 days, with no responses received from any other competitor, requiring additional analysis or consideration
- A signed Sole Source Justification Request submitted by Jay Shade, IT Director
- A signed letter of justification from the supplier, establishing why their product / service is only available from their company
- A notarized Sole Source Affidavit completed by the supplier
- A signed letter of recommendation from Jay Shade, IT Director
- A quote for the services membership in the amount of \$5190.

The term of this Sole Source exemption will be effective from the date of approval until 5/31/2017.

If you have any questions or concerns, please contact me at any time.

Sincerely,

Purchasing Agent / Director



Welcome Mbricka@wilco.org | [Logout](#)
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 or call 800-770-9139

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Bid #1605-077 - Intent To Deem Norex, Inc. Sole Source Of Peer-to-Peer Networking

Time Left	closed	# of offers	0
Bid Started	May 4, 2016 8:40:19 AM CDT	Notifications	Report (Bidder Activity)
Bid Ended	This bid closed on May 18, 2016 3:30:00 PM CDT	# of suppliers viewed	10 (View)
Agency Information	Williamson County, Texas, TX (view agency's bids)	Q & A	Questions & Answers
Department	Purchasing (view department's bids)		
Bid Classifications	Classification Codes		
Bid Regions	Regions		
Bid Contact	see contact information		
Delivery Location	One or more of the following locations Williamson County, Texas Purchasing Department 901 S. Austin Avenue Georgetown TX 78626 Qty 1 Expected Expenditure \$1.00		
View Rules	Click here to change the rules for this bid.		
Best and Final Offer:	Create		

Approval

[View Approval Flow](#) [View Approval Flow](#)

Approval Status [Approved](#)

Description

Bid Number	1605-077
Title	Williamson County- Sole Source- Norex, Inc.- Peer-to-Peer Networking System
Quantity	1 each
Contract Duration	One Time Purchase
Prices Good for	30 days
Budgeted Amount	\$0.00 (change)
Bid Comments	Williamson County, Texas intends to award a sole-source contract with Norex, Inc. for the following item:

Peer-to-Peer Networking - Knowledge-sharing consortium of Information Systems/ Information Technology

THIS IS NOT A REQUEST FOR COMPETITIVE PROPOSALS AND A SOLICITATION WILL NOT BE ISSUED. Interested parties must show clear and compelling evidence of competitive equivalency in order for alternative goods or services to be considered. Williamson County will review any information collected through this RFI to determine if offers of any equivalent goods or services meet the needs of the County. If it is concluded that additional suppliers of equivalent goods or services do exist, then a formal solicitation may follow.

If no affirmative responses are received by 3:30PM May 18th, 2016 showing clear and compelling evidence of competitive equivalency to the items described herein, an award will be made without further notice. Oral communications are not acceptable in response to this notice.

Description Williamson County, Texas intends to award a sole-source contract with Norex, Inc. for the following item:

Peer-to-Peer Networking - Knowledge-sharing consortium of Information Systems/ Information Technology

Please Attach Any Supporting Documentation To This Line



Williamson County Purchasing Department
901 South Austin Ave.
Georgetown, Texas 78626
(512) 943-3553
www.wilco.org/purchasing
purchase@wilco.org

Sole Source Justification Request

This request is for a:

Sole Source Item (goods or services are available from ONLY this supplier due to a unique capability, patent, copyright, secret process, or capability to meet the requirements of the solicitation)

This Sole Source justification requires additional documentation and requirements as listed below. **One of these steps may require placing a public notice in BidSync for 14 days, in order to allow any possible competitors to come forward with equivalent goods or services.** This step will be completed by the Purchasing Team that supports your office or county department after all required documents have been submitted. In addition, all sole source justifications must be approved in Commissioners Court.

Required Documentation that must accompany this request before this purchase can be considered (any missing documentation will result in delays). *Check all included documents:*

- ☒ This request form completed and signed
- ☒ A written quote from the supplier, listing the goods, services and pricing
- ☒ Letter of justification from the supplier (on company letterhead and signed by an authorized representative) establishing why they are the only Sole Source provider of the service or item
- ☒ Notarized Sole source affidavit completed by the supplier
- ☒ Signed letter of recommendation from the Elected Official or County Department Head

Requestor Name and County Office / Department: Jay Schade, Technology Services

Requestor Title: IT Director

Requestor Phone Number: 512-943-1460

Requested Sole Source Supplier:

Company Name: Norex, Inc.

Contact Name: Kitty Maynard

Address: 5505 Cottonwood Lane

City: Prior Lake

State: MN

Zip Code: 55372

Phone Number: 952-447-8898

Email Address: kittym@norex.net

Website: www.norex.net

Is the recommended supplier the manufacturer? ☒ Yes ☐ No

Does the manufacturer sell the item(s) through distributors? ☐ Yes ☒ No

Description of the Product or Service: (if additional space is needed, include a separate page) *Describe the full scope of work, including installation if required, items should include brand, model and part number if applicable.*

This is for a membership renewal for the entire IT group at Williamson County. Norex is a knowledge-sharing consortium of Information Systems/Information Technology departments. Norex facilitates project-specific, vendor-free, information exchanges between IT professionals. They provide a link to the organizations and individuals who have already taken on the same technology or similar project so we don't have to "re-invent the wheel."

Schedule: Identify the date items are needed to be delivered, or month work is to be performed. Please be specific and do not use "ASAP".

Subscription renewal is 6/1/16-5/31/17

Estimated Cost: \$5,190.00

SOLE SOURCE RATIONALE

Complete the following checklist:

The requested supplier is the only source of required item(s) or service(s) because:

Check all that apply:

- ☒ The required item or service is proprietary to the supplier
- ☐ The recommended supplier holds the patent on the requested item(s)
- ☐ The recommended supplier is the only supplier capable of performing the requested service
- ☐ A specific item is needed
- ☐ To be compatible or interchangeable with existing hardware
- ☐ As a spare or replacement hardware
- ☐ For the repair or modification of existing hardware
- ☐ For technical evaluation or testing
- ☐ Have there been any prior attempts to obtain competitive bids or proposals for the items or services that failed?

If so, please list and describe such attempts:

- ☐ There is a substantial risk in selecting another product or service provider.

If so, please describe:

- ☐ It is not possible to obtain competitive bids for consideration.

If so, why:

☒ Are there any other companies who can provide the services or needed items?

If so, please list and provide explanation of why they were unable to meet the requirements:

I have looked at two other entities. One is Info-Tech which offers some peer-to-peer networking as part of their overall product which includes technical research. The cost for that service was over \$20,000. The second is a service we are members of... Gartner... which is primarily a research and consulting organization and they are attempting to add some peer-to-peer networking but it is much more limited at this time than Norex, and is much more expensive (\$50,000). I am not planning on renewing our membership with Gartner when the current year is completed.

☒ List any other sources, suppliers, products or service providers that you reviewed in your selection process:

Info-Tech and Gartner. Both of these companies offer much more than simple peer-to-peer networking... and both are significantly more expensive than Norex.

☒ List all research methods that you reviewed in your selection process (i.e.: specific internet searches, trade publications, references, etc.):

Internet searches. Discussing with colleagues in other organizations.

ACKNOWLEDGEMENT

☒ I affirm and acknowledge Williamson County's requirements, justification and criteria for Sole Source purchases. I have gathered the required technical information, provided all required documentation, have made a concerted effort to review comparable / equal equipment or services to the best of my ability, and further affirm that there is no conflict of interest in my recommendation of the selected item(s), service(s) or supplier.

☒ I also acknowledge and understand that I may be subject to criminal prosecution for the willful falsification of information in this document. I, by the act of signing or typing my name below, hereby certify under penalty of perjury, under the laws of the State of Texas, the foregoing is true and correct.

Date: 4/28/2016

Signature: Jay Schade

** By typing your name, this is equivalent to a legal signature*

NOTE: After a passage of time, an item or service may no longer qualify as a sole source purchase due to other similar items or services becoming available from other suppliers. Thus, all prior sole source determinations must be reapproved by the Williamson County Purchasing Department following completion of a Sole Source Justification Request Process and satisfactory completion of such process must be noted on requisitions and purchase orders.

April 13, 2016

... a better way

Tammy McCulley
Williamson County

Dear Tammy:

We are very pleased to receive your request regarding the NOREX membership renewal for the IT group at Williamson County. Here is the "sole source" letter.

NOREX is a knowledge-sharing consortium of Information Systems (IS)/ Information Technology (IT) departments. We have over 1,200 public and private sector member organizations in the United States and Canada. NOREX facilitates project-specific, vendor-free, information exchanges between IT professionals. We provide a link to the organizations and individuals who have already taken on the same technology or a similar project so you don't have to "re-invent the wheel."

We are privately held and never accept funding or contributions from technology vendors. This independence ensures an unbiased flow of information among our members. *Our mix of members (from a very broad spectrum of industries) and associated services is unique and is not available from any other provider.* In this regard we are the "sole source" for the complement of services provided to our members.

For a flat annual fee, NOREX members have unlimited access to the following resources and services:

- 1) **Peer-to-Peer Networking and Feedback** - professionally facilitated by your NOREX service team with all member-to-member contacts by permission only. Strict confidentiality is maintained.
- 2) **NOREX direct connect** - A dynamic online member community connecting your staff to similarly-tasked IT professionals. Members post and join conversations behind a secured log-in.
- 3) **WebForums** - weekly WebForums to address current IT "hot topics."
- 4) **Roundtables** - members gather face-to-face to share successes and failures. Candid discussions that address real-world issues and build lasting professional relationships.
- 5) **Shared Documents** - policies, procedures, standards, RFPs, RFIs, contracts, SLAs, job descriptions, strategic plans, etc., contributed by NOREX members are available to your entire IT staff. These offer insight into the knowledge and techniques of industry colleagues and shorten your development cycle.
- 6) **Transcripts and Survey Results** - Transcripts of previous WebForums and results from member-requested surveys provide a snapshot of how peers are dealing with current IT issues and challenges.
- 7) **CIO/CTO Group** - Strategic issues of particular interest to C-level IT executives are explored during exclusive quarterly CIO/CTO WebForums.

Our members tell us that NOREX is the most convenient, cost-effective, and easy-to-use source for "real-world" IT information. Of course, this is a reflection of the willingness of our members to openly share their experiences and expertise, and the personal attention our Information Managers give to each member! You may find more details on our website at <http://www.norex.net>. Please call me, or Nancy, if you have any additional questions about the NOREX consortium.

Sincerely,



Marcey L. Iverson
Vice President
Information Team



Williamson County Purchasing Department
901 South Austin Avenue
Georgetown, Texas 78626
(512) 943-3553
www.wilco.org/purchasing
purchase@wilco.org

NOTARIZED SOLE-SOURCE PURCHASE AFFIDAVIT

STATE OF TEXAS
COUNTY OF WILLIAMSON

KNOW ALL MEN BY THESE PRESENTS THAT:

Before me, the undersigned authority duly authorized to take acknowledgments and administer oaths, on this day personally appeared Marcey Iverson, who after being duly sworn on oath stated the following:

My name is Marcey Iverson. My title is Vice President, Information Team. I am aware that the Williamson County Purchasing Department is required to comply with competitive bidding requirements of Chapter 262 of the Texas Local Government Code. I am aware that the statutory competitive bidding provisions do not apply to the purchase of an item that can be obtained from only one source. See, Texas Local Government Code section 262.003.

Sole-source items include:

Items for which competition is precluded because of the existence of patents, copyrights, secret processes, or monopolies, films, manuscripts, or books, electric power, gas, water, and other utility services, and captive replacement parts or components for equipment.

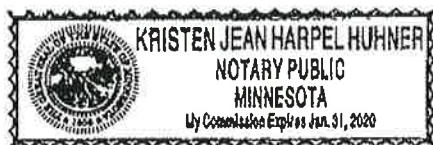
I have represented to the Purchasing Department of Williamson County and I hereby warrant that as of the date below, I am the sole-source supplier of the following item: Norex Information Services. I am the sole-source supplier of this item because: Vendor Free, unbiased peer-based information is not available from any other provider. I agree that if I ever cease being the sole-source supplier of this item, I shall immediately make a full disclosure in writing to the Williamson County Purchasing Department of all relevant facts and circumstances.

IN WITNESS WHEREOF, the undersigned has executed this Affidavit on the 15 day of April, 2016.

Marcey Iverson
[Signature]

Marcey Iverson VP, Information Team
[Printed Name] [Title]

SWORN TO AND SUBSCRIBED before me on April 15, 2016, by KRISTEN HUHNER
[Printed Name]



Kristen J. Harpel Huhner
[Signature] Notary Public
State of Minnesota
My Commission expires on Jan. 31, 2020



April 20, 2016

From: Jay Schade, Sr Director
Williamson County Technology Services

Technology Services

To: Max Bricka
Purchasing Agent / Director
Williamson County Purchasing

Subject: Single / Sole Source Justification Letter

I recommend that we identify Norex as the sole source provider of a knowledge-sharing consortium of Information Systems/Information Technology departments.

Per Norex in their Sole Source Justification, they have over 1,200 public and private sector member organizations in the United States and Canada. They facilitate project-specific, vendor-free information exchanges between IT professionals. They provide a link to the organizations and individuals who have already taken on the same technology or a similar project so others don't have to "re-invent the wheel."

Norex is privately held and never accepts funding or contributions from technology vendors. This independence ensures an unbiased flow of information among their members. Their mix of members (from a very broad spectrum of industries) and associated services is unique and is not available from any other provider. In this regard they are the "sole source" for the complement of services provided to their members.

For more information, see Norex's Sole Source Justification letter and/or visit their website at www.norex.net.

Please let me know if you have any questions.

Thank you.

A handwritten signature in black ink, appearing to read 'J. Schade', written over a horizontal line.

Jay Schade, Sr Director
Williamson County Technology Services

WILLIAMSON COUNTY

512.943.1460 Fax 512.943.1488
301 SE Inner Loop, Suite 105
Georgetown, Texas 78626



QUOTE NUMBER: 637564/0 / JNR
DATE: 04/07/2016

ATTN: JAY SCHADE
COMPANY: WILLIAMSON COUNTY
ADDRESS: SUITE 105
301 SE INNER LOOP
GEORGETOWN, TX 78626

DESCRIPTION	AMOUNT
INFORMATION/NETWORKING/HARDWARE/CONFERENCE SERVICES RENEWAL:	\$5,190.00
TERM: 06/01/2016 TO 05/31/2017	
7554/NJD	
1st Copy - Original, 2nd Copy - Remittance Copy	