



LEXINGTON

JUSTIFICATION FOR SOLE SOURCE CERTIFICATION

Sole Source Purchases are defined clearly, based upon a legitimate need, and are limited to a single supplier. Sole source purchases are normally not allowed except when based upon strong technological grounds such as operational compatibility with existing equipment and related parts or upon a clearly unique and/or cost effective feature requirement. The use of sole source purchases must be justified and shall be limited only to those specific instances in which compatibility or technical performance needs are being satisfied.

Sole Source Services are defined as a service provider providing technical expertise of such a unique nature that the service provider is clearly and justifiably the only practicable source available to provide the service. The justification shall be based on the uniqueness of the service, sole availability at the location required, or warranty or defect correction service obligations of the service provider.

This form must be filled out for the request to purchase any good or non-professional service that requires a competitive procurement process (informal quotes (\$2,499-\$10,000), formal quotes (\$10,001 - \$39,999.99), or formal bid (\$40,000 or more) as defined in the LFUCG's Purchasing Manual. This form must be completed in its entirety and attached to the purchase requisition.

Note: Sole Source Purchase requests for goods exceeding \$40,000 will require approval by the Urban County Council by submitting an Administrative Review Form. A copy of this form must be signed off by Central Purchasing and attached to the Administrative Review Form.

Requesting Division

Name Jeremy S. Poynter

Division Fire

Phone 859-231-5612

Email poynterj@lexingtonky.gov

Type of Purchase: () Goods/Materials/Equipment (X) Services

Cost: \$35,470

Sole Source Request for the Purchase of: Horizon Performance consultancy, software support, and project management.

☒ One Time Purchase

☐ To Establish Sole Source Provider Contract

(subject to annual review and approval by Central Purchasing and/or Urban County Council)

Vendor Information

Business Name Horizon Performance, LLC

Contact Name Jason Skinner

Address 301 E. Main St., Suite 620 Lexington, KY 40507

Phone 859-436-2980 Email jason.skinner@horizonperformance.com



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STATEMENT OF NEED: (Add additional pages as needed)

My division/department's recommendation for sole source is based upon an objective review of the product/service required and appears to be in the best interest of the LFUCG. I know of no conflict of interest on my part, and I have no personal involvement in any way with this request. No gratuities, favors, or compromising actions have taken place. Neither has my personal familiarity with particular brands, types of equipment, materials, persons or firms been a deciding influence on my request to sole source this purchase when there are other known suppliers to exist.

1. Describe the product or service and list the necessary features this product provides that are not available from any other option.

Horizon Performance provides consultancy for professional development, customized software solutions for trainee evaluation and performance assessment, and team development support. The Fire Training Academy will utilize this service to enhance the professional development of recruits, ensuring their career success upon permanent appointment to the Division of Fire.

2. Below are eligible reasons for sole source. Check one and describe.

☐ Licensed or patented product or service. No other vendor provides this. Warranty or defect correction service obligations to the consultant. Describe why it is mandatory to use this licensed or patented product or service.

☐ Existing LFUCG equipment, inventory, custom-built information system, custom-built data inventory system, or similar products or programs. Describe. If product is off-the-shelf, list efforts to find other vendors (i.e. web site search, contacting the manufacturer to see if other dealers are available to service this region, etc.)

☒ Uniqueness of the service. Describe.

The services and software support offered by Horizon Performance include the TrainSure and Performance 360 modules. TrainSure provides data-driven evaluation tools to ensure that recruit firefighters are receiving the most effective and efficient training possible. Performance 360 is a comprehensive assessment tool that measures individual and team effectiveness, resulting in enhanced workforce development. An additional service offered is professional development and training opportunities led by Horizon Performance's staff, which includes PhDs, military veterans, and data analysts. The services offered and having a physical office in Lexington make Horizon Performance unique among other companies in the professional development field.

☐ The LFUCG has established a standard for this manufacturer, supplier, or provider, and there is only one vendor. Attach documentation from the manufacturer to confirm that only one dealer provides the product.

☐ Factory-authorized warranty service available only from this single dealer. Sole availability at the location required. Describe.

☐ Used item with bargain price (describe what a new item would cost). Describe.

☐ Other – The above reasons are the most common and established causes for an eligible sole source. If you have a different reason, please describe:



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3. Describe efforts to find other vendors or consultants (i.e. phone inquiries, web site search, contacting the manufacturer to see if other dealers are available to service region, etc.).

Members searched websites, watched demonstration videos for various performance development solutions, and read reviews of the various solutions. Although several vendors can provide similar performance development tools, only Horizon Performance includes in-person professional development and leadership training as part of their package.

4. How was the price offered determined to be fair and reasonable?

The per-member cost of the performance development and assessment modules within the Horizon Performance proposal is comparable to other performance development tools reviewed. No other vendor can provide the in-person consultation or a brick-and-mortar Lexington location.

5. Describe any cost savings realized or costs avoided by acquiring the goods/services from this supplier.

Future cost savings would be realized through the increased effectiveness of recruit firefighter development. Recruit firefighter retention rates will improve, leading to fewer resignations/terminations and the lost initial training investment.