

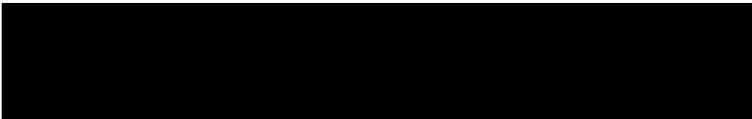
**JUSTIFICATION FOR SOLE SOURCE/BRAND NAME SOLE SOURCE <\$150K**

PLEASE FILL IN ALL APPLICABLE BLOCKS BELOW.  
 A NARRATIVE MUST BE ADDED TO ALL APPLICABLE SECTIONS.

<b>PO Number:</b>		
The effort listed on this form is for: ( <u>please mark one</u> ):	<input checked="" type="checkbox"/> Supply	<input type="checkbox"/> Service
The material and/or service listed on this form is ( <u>please mark one</u> ):	<input checked="" type="checkbox"/> Sole Source	Brand Name

**Restricted to the following source or manufacturer:**

- Manufacturer/Source:  
Mergent Online (Mergent, Inc.)



**Description of the item(s) or service(s) required and the estimated cost(s):**

Item#	MFG Name	MFG Part#	Description	Qty	U/I	Unit Price	Ext Price
1	Mergent, Inc.		Mergent Online	1			

\*\*\* If additional items are required, please provide on a separate spreadsheet

1. List the Required Delivery Date (RDD) or Period of Performance (POP):

October 1, 2016 – September 30, 2017

\*\*\* If additional space is required, please attach a continuation sheet.

2. Specify characteristics of the material or service that limit the availability to a sole source/brand product (unique features, function of the item, etc.). Describe in detail why only this source/brand can furnish the requirements to the exclusion of other sources/brands.

Mergent Inc. is the sole distributor of Mergent Online Services.

Unique Feature 1:

#### 15-30 years of historical company financial data

Faculty in the Graduate School of Business & Public Policy (GSBPP) core course on Financial Reporting & Analysis (GB 3050), as well as in some other GSBPP Financial Management courses (including GB 4052, GB 4550, and MN 3156), require students to use Mergent Online to access and analyze accurate in-depth current and historical company financial information.

Although there are other fee and free databases that provide company financial information, Mergent's goes back the furthest, 30 years in some cases. This historical financial data is crucial for the GSBPP course assignments.

Unique Feature 2:

#### Usability

The most direct competitor to Mergent Online is Bureau Van Dijk's ORBIS/Mint Global. We had that product for a few years (about five years ago) and switched back to Mergent Online because it was significantly less costly and more importantly, students and faculty strongly preferred it due to its superior usability. Faculty using Mergent have indicated that it continues to meet faculty and student needs with minimal guidance required.

As part of the evaluation I reviewed the literature comparing Mergent with either Net Advantage or ORBIS/Mint Global, and this reinforced that for our primary purpose (the pulling together of current and historical detailed company financial data) that Mergent is the best choice. From *Journal of Business & Finance Librarianship*, 16:171-175, 2011, Mergent Online provides public company financial information most of which is available for free online these days, but Mergent adds global coverage of public and private companies with up to 30 years of historical data, provides a link to SEC filings, and allows users to create company comparisons that are easy to download. These value-added features, along with the country, industry and annual reports make Mergent Online an extremely powerful tool for company research.

3. Indicate if the requested material or service represents the minimum requirements of the Government.

The requested material represents the minimum requirements of the Government.

4. Indicate if the material or service must be compatible in all aspects (form, fit, and function) with existing systems presently installed/performing. Describe the equipment/function you have now and how the new item/service must coordinate, connect or interface with the existing system.

5. Does a patent, copyright or proprietary data limit competition?

Yes. This particular compilation of data and the platform used for accessing it are proprietary to Mergent, Inc.

\*\*\* If additional space is required, please attach a continuation sheet.

6. Are the items “direct replacement” parts/components for existing equipment? If so, provide the information about the Next Higher Assembly (NHA)/equipment which the replacement parts are going into (e.g., description, model, part number, Original Equipment Manufacturer (OEM), etc.).
7. Provide any additional information to support a sole source/brand name sole source procurement. The rationale must justify “either” substantial duplication of cost to the Government that is not recovered through competition or unacceptable delays in fulfilling the mission of the agency.

\*\*\* If additional space is required, please attach a continuation sheet.

**TECHNICAL OR REQUIREMENTS CERTIFICATION**

I CERTIFY THAT THE STATEMENTS CHECKED, AND INFORMATION PROVIDED ABOVE ARE COMPLETE AND CORRECT TO THE BEST OF MY KNOWLEDGE. I UNDERSTAND THAT THE PROCESSING OF THIS SOLE SOURCE/BRAND NAME SOLE SOURCE JUSTIFICATION PRECLUDES THE USE OF FULL AND OPEN COMPETITION.



Title:  
Librarian

Date:  
04/06/16

**CONTRACTING OFFICER APPROVAL:**



Title: *Director,  
Contracting + Logistics mgmt*

Date: *8/15/2016*