

North Slope Borough School District

PURCHASING EXEMPTION / SOLE SOURCE JUSTIFICATION FORM

(Required when competitive bidding under BP 3311 is not feasible or when a purchase qualifies for an exemption from formal purchasing procedures.)

1. Requestor & Funding Information

School/Department: Infotech

Requestor Name/Title: Reginald Santos, Director of Technology

Date: 07/28/2026

Funding Source: ☒ General Fund ☐ Grant ☐ Federal Program ☐ Other

Estimated Total Cost: 13,366.00

2. Vendor Information

Vendor Name: Kelley Create

Address: 5601 Silverado Way, Anchorage, AK 99518

Contact Name: Michael Heckert

Phone: 541-621-0221 Email: michael.heckert@kelleycreate.com

3. Description of Goods or Services

(Include quantities, model numbers, specifications, scope of work, contract term, or other relevant details.)

\$371 for 6000 Pages Cloud Fax, \$10 x 13= \$310 DID porting or new fax line

4. Basis for Exemption from Competitive Purchasing Requirements

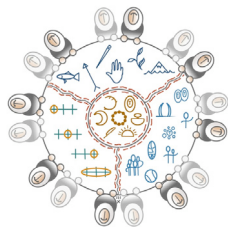
Board Policy 3311 requires competitive bidding whenever it appears to be in the best interest of the District, including:

- Two competitive quotes for purchases of \$10,000 to \$250,000
- Formal advertised bids for purchases over \$250,000
- Compliance with 2 CFR 200.320 for federal awards

A sole source may be approved only when one or more of the following conditions apply.

Select all that apply AND provide explanation.

- ☐ A. Instructional Materials
- ☐ B. In-Service Presenters, Speakers, or Experts
- ☐ C. Professional or Consultant Services
- ☐ D. Jointly Purchased Professional Services
- ☐ E. Public Services, Utilities, Standardization, or Single Source Purchases



North Slope Borough School District

- ☒ F. Emergency Purchases or Product Line Continuity
- ☐ G. Replacement Equipment with Trade-In
- ☐ H. Fair Trade Statute Items
- ☐ I. Cooperative Purchasing Agreements or Existing Contracts
- ☒ J. Time-Sensitive Health, Safety, or Legal Compliance Requirements
- ☒ K. Proprietary or Sole Source Purchase

Explanation:

5. Market Research / Supporting Documentation

(Document steps taken to confirm that competitive bidding is not feasible.)

Examples: vendor outreach, product comparison, online research, consultation with subject matter experts.

Please see attached sole source justification

6. Consequences if Competitive Purchasing Procedures Are Required

(Operational, instructional, financial, or compliance impacts.)

Please see attached sole source justification

7. Certification and Approvals

Requestor Certification:

I certify that the information provided on this form is accurate and complete to the best of my knowledge and that the purchase qualifies for the exemption identified above under BP 3311.

Requestor Signature/Date:

07/28/2026

Program/Grant Manager *(if applicable)*:

Purchasing/Finance Review:

☐ Approved ☐ Denied ☐ Additional Documentation Required

Purchasing/Finance Signature/Date:

Sole Source / Sole Brand Procurement Justification

WestFax / Kelley Create Cloud Fax Service

Purpose

The North Slope Borough School District (NSBSD) requires a cloud fax solution that integrates directly into existing document workflows while minimizing manual handling of incoming documents. After evaluating the District's operational requirements and available solutions, WestFax has been identified as the only solution that meets all critical functional requirements without requiring additional third-party software or custom development.

Current Environment

NSBSD currently utilizes eFax for electronic fax services. While eFax provides basic fax transmission and email delivery, it does not provide the automation capabilities necessary to support the District's document management workflow.

Incoming faxes are manually received through email, downloaded by staff, renamed if necessary, and copied into departmental network folders. This manual process:

- Increases staff workload
- Delays document availability
- Creates opportunities for human error
- Increases the risk of misplaced or deleted documents
- Produces inconsistent document organization

Operational Requirement

The District requires a fax solution capable of automatically delivering received fax documents directly into designated Windows network shares (SMB/UNC paths) without user intervention.

This functionality is required because:

- Departments already use secured network shares as their official document repositories.
- Existing workflows and permissions are built around Windows file shares.
- Automatic filing improves records management consistency.
- Staff should not be required to manually retrieve, rename, and file every incoming fax.
- Automated storage provides immediate availability for multiple authorized users.

Required Technical Capabilities

The required solution must provide:

- Automatic download of inbound fax documents.
- Direct delivery to Windows network shares (UNC paths).
- Background synchronization without user interaction.
- Configurable file naming conventions.
- Near real-time processing of incoming documents.
- Ability to operate as a Windows service or server-side agent.
- Centralized administration.

WestFax Capabilities

WestFax provides enterprise workflow tools that include:

- A Windows-based Cloud Fax Toolkit capable of automatically downloading inbound faxes to local folders, Windows network shares, or UNC paths.
- FaxDrive, which continuously synchronizes inbound (and outbound) fax documents to local or network storage, runs as a Windows service, supports redundant backup locations, configurable synchronization intervals, and customizable file naming conventions.
- Enterprise workflow automation capable of automatically saving, routing, and processing incoming documents based on configurable rules.

These capabilities allow incoming faxes to become part of the District's existing electronic document repository immediately upon receipt without staff intervention.

Limitations of Current eFax Solution

The District's current eFax implementation does not provide the required server-side automation for automatically depositing inbound faxes directly into Windows network shares as part of its standard workflow.

Instead, documents must typically be:

1. Delivered to an email mailbox.
2. Opened by staff.
3. Downloaded manually.
4. Renamed if necessary.
5. Copied into the appropriate network folder.

This manual process does not satisfy the District's operational requirement for automated document routing and increases administrative overhead.

Benefits to the District

Migration to WestFax will provide:

- Reduced manual processing time
- Faster document availability
- Improved consistency in records management
- Reduced risk of misplaced documents
- Standardized document naming
- Improved collaboration through shared network storage
- Better integration with existing Windows infrastructure
- Reduced administrative workload for office personnel

Sole Source Determination

Based upon the District's evaluation, WestFax is the only identified solution that satisfies the District's required functionality of providing an integrated Windows service capable of automatically synchronizing inbound fax documents directly to designated network shares while supporting configurable file naming, background synchronization, and enterprise workflow automation without requiring additional third-party middleware or custom software development.

Accordingly, procurement of WestFax is justified as a sole source (or sole brand) acquisition because the required operational functionality cannot be met by the District's existing eFax service without significant manual intervention or additional unsupported software components.

Consequences if Competitive Purchasing Procedures Are Required

Requiring a competitive procurement would delay implementation of the District's new fax service, prolonging manual document processing and preventing the automated storage of inbound faxes to departmental network shares.

Additionally, the District has already discontinued renewal of its current eFax service. Any delay in procuring WestFax could result in incoming faxes being rejected or undeliverable. The District's existing fax numbers must be ported to the new provider as soon as possible to ensure continuity of service and to avoid missing time-sensitive communications, including student records, personnel documents, financial information, and other official business.