

Mississippi State University Notice of Proposed Sole Source Purchase

Mississippi State University anticipates purchasing the item(s) listed below as a sole source purchase. Anyone objecting to this purchase shall follow the procedures outlined below.

1. Commodity or commodities to be purchased (make, model, description):

LivePlan Premium is a business plan tool used to develop business plans.

2. Explanation of the need to be fulfilled by this item(s), how is it unique from all other options, and why it is the only one that can meet the specific needs of the department:

Need to be fulfilled:

LivePlan Premium is used in the MSU Boots to Business Revenue Readiness (B2BRR) course funded by SBA – the curriculum is written around this tool. Students of the course are active-duty military members, veterans, National Guard and Reserve, and military spouses around the world. During the six-week B2B RR course, students develop a business plan and MSU instructors provide feedback using the LivePlan tool. At the end of the six-week course, the students' plan is transferable to another LivePlan account provided/funded by SBA for the students to continue working on their plan.

Why it's unique:

LivePlan, while not the only business plan tool, does have unique capabilities that are not apples to apples to other software. These capabilities include:

- **Transferability to another LivePlan account** owned by SBA (grantor) at the end of six week class. SBA expects this transferability.
- **Centralized management of the accounts.** There are up to 140 plans being worked on at a time with 8 instructors handling about 20 each per six week class. With 36 classes a year, it accommodates 960 plans that are centrally managed, plus prior year plans that are archived.
- **Reusable seats.** Only need to purchase 140 annual seats as seats are reusable for the next class that starts. This translates into 960 individual student plans a year.
- **Plans can be Archived and Retrieved.** LivePlan has been used since 2018 and past plans (approximately 6000) are required to be retrievable upon request.
- **American Owned.** As this grant is funded by SBA, fits within Buy American Executive Order.
- **Able to provide VPAT and HECPAT** as required by the university.
- **AI Capable** – Artificial Intelligence capability through LivePlan Assistant feature.

3. Name of company/individual selling the item and why that source is the only possible source that can provide the required item(s):

Palo Alto Software, Inc. Per Palo Alto's sole source letter (attached): "LivePlan partner licensing is sold directly by Palo Alto Software, Inc. These licenses, including any applicable partner pricing, are not available for purchase through third-party resellers, distributors, or other outside vendors."

4. Estimated cost of item(s) and an explanation why the amount to be expended is considered reasonable:

Each annual license is \$100; monthly cost per student is \$8.33. For reasonableness comparison, this is a 72% discount from the price advertised to the public which is \$30/month if paid annually. It is the same price as the license has been since 2022 - no cost increase.

5. Explanation of the efforts taken by the department to determine this is the only source and the efforts used to obtain the best possible price:

There were no other sources from which to buy LivePlan Premium other than through Palo Alto Software Inc. While there are other business plan tools, many were much higher cost, and none could provide all the unique capabilities listed in #2, particularly the capability to transfer a plan prepared under the grant to another LivePlan account holder (i.e. SBA or other SBA resource partner

A full cost comparison between LivePlan and other tools would need to not only include the subscription price but would also include implementation/administrative/project cost to make a change that includes: Rewrite the B2B RR courseware for new software, train instructors on new tool/material, record new training videos, and add staff to manually do the administrative functions lacking in other tools.

Any person or entity that objects and proposes that the commodity listed is not sole source and can be provided by another person or entity shall submit a written notice to:

Jennifer Mayfield, CPPO

Deputy Director of Procurement Services, Chief Procurement Officer

jmayfield@procurement.msstate.edu

Subject Line must read "Sole Source Objection"

The notice shall contain a detailed explanation of why the commodity is not a sole source procurement. Appropriate documentation shall also be submitted if applicable.

If after a review of the submitted notice and documents, MSU determines that the commodity in the proposed sole source request can be provided by another person or entity, then MSU will withdraw the sole source request publication from the procurement portal website and submit the procurement of the commodity to an advertised competitive bid or selection process.

If MSU determines after review that there is only one (1) source for the required commodity, then MSU will appeal to the Public Procurement Review Board. MSU will have the burden of proving that the commodity is only provided by one (1) source.