



Sole Source Request Form Instruction Sheet

COUNTY POLICY ON SOLE SOURCE CONTRACTS:

It is the policy of the County of Orange to solicit competitive bids and proposals for its procurement requirements. Per the Contract Policy Manual, a sole source procurement shall not be used unless there is clear and convincing evidence that only one source exists to fulfill the County's requirements, CPM section 4.5. All sole source purchases requiring Board of Supervisors approval shall be justified as meeting the sole source standard in the Agenda Staff Report. The Agenda Staff Report shall clearly state that it is a sole source procurement. The Sole Source Justification, as described below, shall be attached within the Agenda Staff Report (CPM, Section 4.5)

SECTION I – INSTRUCTIONS FOR COMPLETING THE ATTACHED FORM

(To be completed by the department's end-user, Program Manager, or Subject Matter Expert)

1. Formal justification is required for sole source procurements when competitive bid guidelines require pricing from competing firms.
2. A written justification will be prepared by the department and approved by the department head or designee.
3. Prior to execution of a contract, the County Procurement Officer or designee shall approve ALL sole source requests for commodities that exceed \$250,000 annually, services exceeding \$75,000 annually and all Board contracts despite the amount. Board approval is required for all sole source contracts for commodities that exceed \$250,000 annually and services exceeding \$75,000 annually or a two (2) year consecutive term, regardless of the contract amount. Any amendments to Board approved sole source contracts require a new sole source form.
4. If vendor is a retired, former Orange County employee, CEO Human Resource Services shall approve the sole source request, regardless of the sole source amount.
5. Valid sole source requests will contain strong technological and/or programmatic justifications. Requests will explain how it is a sole source purchase, provide a clear and convincing justification and detail the purchasing history (who, what, when, how and where).
6. Sole source procurements may be approved based upon emergency situations in which there is not adequate time for competitive bidding.
7. Sole source requests for Human Service contracts will be guided by the regulations of the funding source.
8. Each question in Section II of this form must be answered in detail and the form signed by the department head with concurrence of the Deputy Purchasing Agent.
9. All sole source request forms must be entered into the County's online bidding system along with its supporting documentation.
10. The Deputy Purchasing Agent (DPA) shall retain a copy of the justification/approval as part of the contract file.
11. Request for Solicitation Exemption (*For purchases with special circumstances, and/or when it is determined to be in the best interest of the County*) – check the Solicitation Exemption box and complete additional question no 8.



Sole Source Request Form

Sole Source Bidsync #042-1575271-JFC-SS

SECTION II – DEPARTMENT INFORMATION (Complete in its entirety)

Department: HCA, Clinical Services		Date: November 3, 2022	
Vendor Name: Equity & Impact Solutions, LLC		Sole Source BidSync Number: #042-1575271-JFC-SS	
Is the above named vendor a retired employee of the County of Orange? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes", review and Approval is required from CEO Human Resource Services prior to contract execution.			
Contract Term (Dates): 3/1/2023-2/28/2026		Is Agreement Grant Funded? Yes Percent Funded: 100% Funding Source: Centers for Disease Control and Prevention (CDC) Ending the HIV Epidemic (EHE)/California Department of Public Health State Office of AIDS <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Contract Amount? \$175,000 annually		Proprietary? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Is this renewable? If yes, how many years? Yes. Two year renewal	
Type of Request: <input checked="" type="checkbox"/> New <input type="checkbox"/> Multi-Year <input type="checkbox"/> Renewal <input type="checkbox"/> Amendment <input type="checkbox"/> Increase			
Renewal Year: 3/1/2026-2/28/2028		Did vendor provide a sole source affidavit? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes, please attach	
Board Date: 1/24/23	ASR Number: TBD	If not scheduled to go to the Board explain why? N/A	
Does Contract include Non-Standard Language? If yes, explain in detail. No			
Was Contract Approved by Risk Mgmt.? N/A		Was Contract Approved by County Counsel? In Progress	
Were any exceptions taken? If yes, explain in detail. No exemptions were taken by the vendor			
<input checked="" type="checkbox"/> DPA certifies that they have read and verified that the information is true and satisfies the sole source requirements listed in the County Contract Policy Manual.			
<input type="checkbox"/> Solicitation Exemption <i>(For purchases with special circumstances, and/or when it is determined to be in the best interest of the County.)</i>			



Sole Source Request Form

Sole Source Bidsync #042-1575271-JFC-SS

SECTION III – SOLE SOURCE JUSTIFICATION

- 1. Provide a description of the type of contract to be established.** *(For example: is the contract a commodity, service, human service, public works, or other – please explain.) Attach additional sheet if necessary.*

This is a human services contract to address disparities in health outcomes along the HIV Continuum of Care, improve access to HIV care and prevention services, and increase participation in the HIV community planning process among populations disproportionately impacted by the human immunodeficiency virus (HIV) epidemic in Orange County, specifically African Americans (AA)/Blacks.

- 2. Provide a detailed description of services/commodities and how they will be used within the department. If this is an existing sole source, please provide some history of its origination, Board approvals, etc.** *(This information may be obtained from the scope of work prepared by the County and the vendor's proposal that provides a detailed description of the services/supplies.) Attach additional sheet if necessary.*

Equity & Impact Solutions, LLC will collaborate with County and AA/Black-led community-based organizations (CBO's) to develop and implement community engagement, needs assessment, and capacity building activities. Grant funding is from the U.S. Department of Health and Human Services, Centers for Disease Control and Prevention (CDC) for the project titled, "Integrated HIV Programs for Health Departments to Support Ending the HIV Epidemic (EHE) in the United States." County of Orange Grant Agreement No.: 20-10748 awarded through the California Department of Public Health, State Office of AIDS. The project period for this grant is through July 31, 2025. Services to be provided by Equity & Impact Solutions, LLC include:

- Community engagement and needs assessment activities shall focus on AA/Blacks living with HIV or at risk of HIV who reside in Orange County. Activities shall also prioritize HIV service providers and key stakeholders from community, civic, and/or faith-based organizations who represent and/or serve AA/Black communities in Orange County. Community engagement and needs assessment activities include, but are not limited to surveys, focus groups, key informant interviews, and/or community forums to identify community assets and barriers to inform the delivery of, and improve access to, HIV care and prevention services for AA/Black populations in Orange County.
- Develop and implement a mobilization strategy to engage HIV service providers and AA/Black-led CBOs to build capacity among Orange County's workforce to provide culturally competent and trauma-informed care to AA/Black communities.
- Partner (subcontract) with AA/Black-led CBOs in Orange County to build the community's capacity in the HIV needs assessment and community mobilization process.



Sole Source Request Form

Sole Source Bidsync #042-1575271-JFC-SS

- 3. Explain why the recommended vendor is the only one capable of providing the required services and/or commodities. How did you determine this to be a sole source and what specific steps did you take? Please list all sources that have been contacted and explain in detail why they cannot fulfill the County's requirements. Include vendor affidavit and/or other documentation which supports your sole source.** *(Responses will include strong programmatic and technological information that supports the claim that there is only one vendor that can provide the services and/or commodities. Your response will include information pertaining to any research that was conducted to establish that the vendor is a sole source, include information pertaining to discussions with other potential suppliers and why they were no longer being considered by the County.)*
Attach additional sheet if necessary.

Based on the most current U.S. Census population estimates, AA/Blacks make up 2.2% of the population in Orange County. Because the percentage of AA/Blacks in the County is small there are a limited number of organizations that specifically serve this population in Orange County.

This vendor was identified through consulting with State Office AIDS and federal partners, including a technical assistance provider which indicated that Equity & Impact Solutions, LLC is currently the only organization in the Southern California region that has expertise in HIV/AIDS in the AA/Black community that can provide the requested services, specifically culturally relevant HIV-related community engagement/needs assessment, capacity building, and community mobilization services. The founder and principal consultant of Equity & Impact Solutions, LLC serves on the President's Advisory Council on HIV/AIDS, L.A. County's Division of HIV & STD Programs EHE Steering Committee and is the former CEO of the Black AIDS Institute (BAI).

Given Equity & Impact Solutions, LLC's expertise with HIV/AIDS, engagement of AA/Black communities/stakeholders, this organization is the only one that can facilitate the provision of culturally relevant HIV-related community engagement/needs assessment, capacity building, and community mobilization services.

The EHE CDC funding that will be utilized for this proposed Sole Source requires that programs and services are developed and implemented with input from populations affected by HIV to ensure the goals of the EHE initiative are met. In Orange County, this includes the AA/Black population as they are disproportionately impacted by HIV. Furthermore, the proposed community engagement and needs assessment activities are part of County's approved EHE CDC work plan.

- 4. How does recommended vendor's prices or fees compare to the general market?**
Attach quotes for comparable services or supplies. Attach additional sheet if necessary.

Fees for similar services are comparable. The proposal from BAI for similar work totaled \$36,195. However, this did not include development and implementation of an HIV community mobilization strategy, development of needs assessment collateral materials, implementation of a community event to disseminate needs assessment findings and mobilize stakeholders to implement identified next steps, or partnership development and capacity building with AA/Black serving CBOs which Equity & Impact Solutions, LLC will also provide.

Also, most services would have been provided virtually by BAI while Equity & Impact Solutions can provide in-person services to ensure maximum engagement and partnership development. Furthermore, given anticipated challenges reaching this community, the proposed price is reasonable. The total proposed budget is \$175,000. A portion of the



Sole Source Request Form

Sole Source Bidsync # 042-1575271-JFC-SS

budget (\$25,000) will be allocated to subcontract(s) with AA/Black serving CBOs in Orange County to co-host the planned community event and to provide input on needs assessment activities, such as survey tools and needs assessment summary report.

5. If the recommended vendor was not available, how would the County accomplish this particular task?

Attach additional sheet if necessary.

If the recommended vendor was not available, the County would not be able to accomplish required community engagement and needs assessment activities to address the disproportionate impact of HIV/AIDS among the AA/Black population in Orange County.

6. Please provide vendor history – name change, litigation, judgments, aka, etc. for the last 7 years.

Through the normal County of Orange vetting process, Equity & Impact Solutions, LLC, has had no name changes within the last seven (7) years, and no judgements or litigation on public record.

7. If vendor is a retired, former employee, has the vendor previously been rehired as a contractor within the last three years? Yes No

If yes, provide explanation/support for hiring the retired, former employee as a vendor and provide contract dates, scope of work, and total amounts paid under each contract.

8. Explain (in detail) why a request for Solicitation Exemption is needed. (Only applicable for Solicitation Exemption)

Attach additional sheet if necessary.

N/A



Sole Source Request Form

Sole Source Bidsync # 042-1575271-JFC-SS

SECTION IV – AUTHOR/REQUESTOR

Signature: DocuSigned by: <i>Matilde Gonzalez-Flores</i> 3234EC7997C0436...	Print Name: Matilde Gonzalez-Flores	Date: 11/22/2022
--	--	---------------------

SECTION V – CEO Human Resource Services APPROVAL (Review and approval is required when vendor is a Retired, Former Employee.)

Signature:	Print Name: N/A	Date:
------------	--------------------	-------

SECTION VI – DEPUTY PURCHASING AGENT CONCURRENCE

Signature: DocuSigned by: <i>Joe Cook-Giles</i> 41634ABBAAC8457...	Print Name: Joseph Cook-Giles	Date: 11/22/2022
---	----------------------------------	---------------------

SECTION VII – DEPARTMENT HEAD APPROVAL

Signature: DocuSigned by: <i>Clayton Chau</i> AFEE619990EB464...	Print Name: Dr. Clayton Chau	Date: 11/29/2022
---	---------------------------------	---------------------

SECTION VIII – COUNTY PROCUREMENT OFFICE

Prior to execution of a contract, the County Procurement Officer or designee shall approve All Sole Source requests for Commodities that exceed \$250,000, Capitol Assets and services exceeding \$75,000, and All other Sole Source requests that require Board approval despite the amount. Approvals are obtained electronically through the County’s online bidding system.

SOLICITATION EXEMPTION – CEO USE ONLY:

Board of Supervisor Notification Date:			
Comments:			
CPO: <input type="checkbox"/> Approved <input type="checkbox"/> Denied		CFO: <input type="checkbox"/> Approved <input type="checkbox"/> Denied	
CPO Authorized Signature:		CFO Authorized Signature:	
Date:		Date:	

Release Bid Workflow

Name: Joe Cook-Giles
Phone: 7148347602
Email: JCook-Giles@ochca.com
Status: Submitter Nov 29, 2022 10:31:59 AM PST

Bid Information

Bid Number:

[042-1575271-JFC-SS](#)

Bid Title:

Equity & Impact Solutions, LLC

Status

Status:
Approved

[View Workflow History](#)



Close

Questions? Contact a Periscope Source representative: 800-990-9339 or email: source-support@periscopeholdings.com

