OCProcurement

# 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.

OCProcurement

# Sole Source Request Form

Sole Source BidSync # 017-2265201-NS-SS

**SECTION II – DEPARTMENT INFORMATION (Complete in its entirety)**

| | |
|---|---|
| Department:<br>County Executive Office | Date:<br>July 19, 2022 |
| Vendor Name:<br>Human Options, Inc. | Sole Source BidSync Number:<br>017-2265201-NS-SS |

**Is the above-named vendor a retired employee of the County of Orange**? ☐ Yes ☒ No
**If "Yes", review and Approval is required from CEO Human Resource Services prior to contract execution.**

| | | |
|---|---|---|
| Contract Term (Dates):<br>July 27, 2021 to December 31, 2023 | Is Agreement Grant Funded? ☒ Yes ☐ No<br>Percent Funded: 100%<br>Funding Source: American Rescue Plan act of 2021 | Proprietary?<br>☐ Yes ☒ No |

| | |
|---|---|
| Contract Amount?<br>$476,890 (Term), $920,260 (Total) | Is this renewable? If yes, how many years?<br>No |

Type of Request:
☐ New ☐ Multi-Year ☐ Renewal ☒ Amendment ☐ Increase

| | |
|---|---|
| Renewal Year:<br>N/A | Did vendor provide a sole source affidavit? ☐ Yes ☒ No<br>If yes, please attach |

| | | |
|---|---|---|
| Board Date:<br>July 19, 2022 | ASR Number:<br>22-000588 | If not scheduled to go to the Board explain why?<br>N/A |

Does Contract include Non-Standard Language? If yes, explain in detail.
No, this Contract does not include Non-Standard Language.

| | |
|---|---|
| Was Contract Approved by Risk Mgmt.?<br>Risk review not required because contract has standard terms and conditions | Was Contract Approved by County Counsel?<br>County Counsel review is pending |

Were any exceptions taken? If yes, explain in detail.
No

☒ 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.

☐ Solicitation Exemption
*(For purchases with special circumstances, and/or when it is determined to be in the best interest of the County.)*

OCProcurement

**Sole Source Request Form**

Sole Source BidSync # 017-2265201-NS-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 service contract for the provision of housing search assistance, unit identification, financial assistance and housing stabilization services in support of the U.S. Department of Housing and Urban Development's (HUD) Emergency Housing Voucher (EHV) Program.

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.**

   On March 11, 2021, President Biden signed the American Rescue Plan Act of 2021 (ARPA) into law, which provides over $1.9 trillion in relief to address the continue impact of the COVID-19 pandemic on the economy, public health, State and local governments, individuals and businesses. Section 3202 of the ARPA appropriates $5 billion for new incremental Emergency Housing Vouchers (EHVs), the renewal of those EHVs, and fees for the cost of administering the EHVs and other eligible expenses defined by notice PIH 2021-15 (HA). Through this new EHV Program, the U.S. Department of Housing and Urban Development (HUD) is providing 70,000 housing choice vouchers to local Public Housing Authorities (PHAs) to assist individuals and families who are experiencing homelessness, at risk of homelessness, fleeing or attempting to flee domestic violence, dating violence, sexual assault, stalking, or human trafficking, or were recently homeless or have a high risk of housing stability.

   The Orange County Housing Authority (OCHA) has received a total of 557 EHVs. OCHA is working in partnership with the County Executive Office (CEO), and Human Options to make the EHV Program available to individuals and families who are fleeing or attempting to flee domestic violence, dating violence, sexual assault, stalking, or human trafficking. This includes providing individuals and families who are issued an EHV with housing search assistance to identify a rental unit that accepts EHVs and providing housing stabilization services for a minimum of 12 months to assist the household in achieving housing stability.

   Contracting with Human Options will support OCHA in meeting leasing up deadlines and increase the likelihood of receiving additional bonus funding for EHV Program. Additionally, it would support the County of Orange's development of a comprehensive System of Care that effectively addresses the homelessness of a very vulnerable subpopulation in Orange County. Many victims of domestic violence face higher barriers to safety and housing stabilization due to serious health and legal issues, trauma and lack of income development. The EHV program will provide lasting economic support, ongoing safety and housing stability to our highest need survivors who would not gain stability otherwise.

   Through this contract Human Options will ensure households will be supported with vouchers provided through the EHV program, receive wraparound services and additional resources to leverage the EHV program.

3. **Explain why the recommended vendor is <u>the only one capable of providing the required services and/or commodities</u>. 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*

**Sole Source Request Form**

Sole Source BidSync # 017-2265201-NS-SS

*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.**

Human Options has been designated as the lead agency for three distinguished domestic violence service organizations in Orange County, namely Human Options, Laura's House, and Women's Transitional Living Center, Inc. (WTLC) and will act as the fiscal agent for these three organizations. Human Options will also work with Families Forward to support in the unit identification process and leveraging of landlord network to identify appropriate rental housing for the EHV participants. These organizations will quickly provide specialized support services to survivors of domestic violence who are issued EHV program from OCHA, collectively serving the different Service Planning Areas of Orange County and bring expertise in the unit identification and leasing activities. The four organizations will coordinate and prioritize those who are fleeing domestic violence, dating violence, sexual assault, stalking or human trafficking, have active or previous enrollment within existing programs and low income or lack of income potential.

Human Options has proposed a comprehensive service delivery plan that will provide trauma-informed and survivor-centered support to those who are in highest need for EHVs. Specialized services will target survivor needs and maximize resource utilization to assist with legal issues, trauma impacts, serious health conditions, and other barriers caused by abuse that can be lasting and disruptive. Services will also include housing search and placement assistance, case management and other support in collaboration with OC United Way to secure rental housing for prioritized survivors.

Human Options, as the lead agency for the collective domestic violence service organizations is the only vendor that has the technical knowledge and capacity needed to quickly implement this program, which has an aggressive timeline set forth by the funding agency. Human Options is representing three organizations in Orange County that have experience serving this population and the capability to coordinate with other agencies and promote support services that will augment the EHV program.

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

   The costs related to this contract are commensurable with other providers, as the provider is the lead agency representing a collaborative of Victim Service Provider agencies in Orange County that will administer these services. No other vendors were engaged for these services, as no others met this requirement.

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 of Orange would have been challenged to provide specialized supportive services to survivors of domestic violence who are issued an EHV. The EVH program implementation timeline is aggressive and complex and requires immediate augmentation of services to ensure successful implementation for the County of Orange and for the households serviced. Additionally, the County of Orange would be challenged to provide the needed specialized services to survivors of domestic violence experiencing homelessness throughout the Orange County until another provider was designated as the lead agency for Victim Service Providers.

OCProcurement

# Sole Source Request Form

Sole Source BidSync # 017-2265201-NS-SS

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

   No name changes, litigation, or judgments in the last 7 years.

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.**

   N/A

8. **Explain (in detail) why a request for Solicitation Exemption is needed.** *(Only applicable for Solicitation Exemption)*
   **Attach additional sheet if necessary.**

   N/A

Attachment J

OCProcurement

# Sole Source Request Form

Sole Source Bidsync # 017-2265201-NS-SS

## SECTION IV – AUTHOR/REQUESTOR

| Signature: | Print Name: | Date: |
|---|---|---|
| DocuSigned by: Zulima Lundy 7BCA567EF409420... | Zulima Lundy | 6/20/2022 |

## SECTION V – CEO Human Resource Services APPROVAL

(Review and approval is required when vendor is a Retired, Former Employee.)

| Signature: | Print Name: | Date: |
|---|---|---|
| | | |

## SECTION VI – DEPUTY PURCHASING AGENT CONCURRENCE

| Signature: | Print Name: | Date: |
|---|---|---|
| DocuSigned by: Helen Hernandez FB88112D880C4C2... | Helen Hernandez | 6/20/2022 |

## SECTION VII – DEPARTMENT HEAD APPROVAL

| Signature: | Print Name: | Date: |
|---|---|---|
| DocuSigned by: Doug Beckt C3F502060A0B46A... | Zulima Lundy | 6/20/2022 |

## 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, Capital 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: ☐Approved ☐Denied | CFO: ☐Approved ☐Denied |
| | |
| | |
| **CPO Authorized Signature:** **Date:** | **CFO Authorized Signature:** **Date:** |

Periscope Source

Welcome jacqueslam | Logout

Need assistance? Contact us or call 800-990-9339

Home | Search | Source | Contracts | Purchasing | Tools

## Release Bid Workflow

### Bid Information

**Bid Number:**

017-2265201-NS-SS

**Bid Title:**

SOLE SOURCE - HUMAN OPTIONS - HUD EHV PROGRAM

### Status

**Status:**

Approved

View Workflow History

Close



Copyright © 2020 - Periscope Holdings, Inc. - All rights reserved.