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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 Purchasing Agent 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.
4. If vendor is a retired, former Orange County employee, CEO Budget 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.

Attachment B

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Sole Source Request Form

Sole Source Bidsync #SS-01218230050-CoC

SECTION II – DEPARTMENT INFORMATION (Complete in its entirety)

Department: OC Community Resources	Date: 9/6/2018
Vendor Name: The Chrysalis Center	Sole Source BidSync Number: SS-012-18230050-CoC
Is the above named vendor a retired employee of the County of Orange? ☐ Yes ■ No **If "Yes", review and Approval is required from CEO Budget prior to contract execution.**	
Contract Term (Dates): 11/17/2018 to 6/30/2019	Is Agreement Grant Funded? ☐ Yes ■ No; Percent Funded: 100%; Funding Source: NCC; Proprietary? ☐ Yes ■ No
Contract Amount? $200,000	Is this renewable? If yes, how many years? Unknown if it will be renewed.
Type of Request: ■ New ☐ Renewal ☐ Multi-Year ☐ Amendment ☐ Increase	
Renewal Year: Unknown if it will be renewed.	Did vendor provide a sole source affidavit? ☐ Yes ■ No If yes, please attach
10/16/18 — ASR Number: 18-000870	If not scheduled to go to the Board explain why?
Does Contract include Non-Standard Language? If yes, explain in detail. No. The contract includes standard insurance language.	
Was Contract Approved by Risk Mgmt.? Not needed. No deviations to standard insurance.	Was Contract Approved by County Counsel? Yes
Were any exceptions taken? If yes, explain in detail. No exceptions were made.	
■ 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.	

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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 human service contract for employment services for individuals experiencing homelessness. It is a 8 month contract.

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.**

Chrysalis Center will provide client outreach and engagement, job readiness and barrier removal services, job search assistance and support, transitional employment opportunities and job retention support to the County's homeless population and help drive ongoing regional coordination of resources to assist individuals and families experiencing homelessness in Orange County. Chrysalis will work collaboratively with County staff to support regional efforts to address homelessness.

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 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. Attach additional sheet of necessary.

Attach additional sheet if necessary.

This is a unique contract with Chrysalis Center. Chrysalis Center is contracting with the City of Anaheim to provide job training and other workforce development services for people experiencing homelessness in Orange County. This contract allows the County to leverage those resources to help provide additional resources to the County's funded shelters. This funding was directed by the County CEO's office to help expand our system of care. No other organization is in a position to provide the leveraged services that Chrysalis Center can through this contract. Chrysalis Center has over 30 years of experience providing services to the homeless and low-income individuals by providing the resources and support needed to find and retain employment. Chrysalis Center offers a transitional employment program that has become a recognized and proven best practice model for serving individuals experiencing homelessness and those formerly incarcerated, to help them re-enter the mainstream workforce and achieve self-sufficiency.

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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.**

Due to the directive given to contract with Chysalis this is not applicable.

5. **If the recommended vendor was not available, how would the County accomplish this particular task?** **Attach additional sheet if necessary.**

Not applicable, the recommended vendor provides unique expertise and is already working with the City of Anaheim which allows the County to quickly offer services to those experiencing homelessness.

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

In 2012 there was a litigation complaint made in Small Claims Court for unpaid wages three years earlier. In January, 2013, the plaintiff withdrew his complaint.

In the past 7 years there has been no other litigation and/or judgments. There have been no name changes.

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.

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Sole Source Bidsync #SS-01218230050-CoC

SECTION IV – AUTHOR/REQUESTOR

Signature:	Print Name:	Date:
DocuSigned by: Juanita Preciado E6039BF6D71242A...	Juanita Preciado	9/26/2018

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: Heather Condon 42473A6AB9AB48B...	Heather Condon	9/26/2018

SECTION VII – DEPARTMENT HEAD APPROVAL

Signature:	Print Name:	Date:
DocuSigned by: F6D0C81B99BD4F3...	Jim Wheeler	9/26/2018

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.

Attachment B

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Release Bid Workflow

```
Name:   Heather Condon
Phone:  714 566-3059
Email:  heather.condon@occr.ocgov.com
Status: Submitter  Sep 26, 2018 11:41:08 AM PDT
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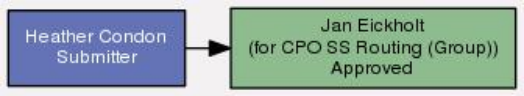

Bid Information

Bid Number:

SS-01218230050COC

Bid Title:

Chrysalis Center Sole Source Contract

Status

Status:

Approved

View Workflow History

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