



## 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.



# Procurement

## Sole Source Request Form

Sole Source Bidsync # 017-2224201-NS-SS

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

Department: County Executive Office		Date: 6/16/2022	
Vendor Name: American Family Housing		Sole Source BidSync Number: 017-2224201-NS-SS	
<b>Is the above named vendor a retired employee of the County of Orange?</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>If "Yes", review and Approval is required from CEO Human Resource Services prior to contract execution.</b>			
Contract Term (Dates): July 19, 2022 – June 30, 2027		Is Agreement Grant Funded? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Percent Funded: 80% Grant funded, 20% Other Funding Source: HHAP-CoC-Round 2 and HHAP-County-Round 2; Cal-Optima Intergovernmental Transfers and State Housing; and Community Development Homekey Operating Funding; Other (City of Huntington Beach)	
		Proprietary? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Contract Amount? \$9,200,000		Is this renewable? If yes, how many years? No	
Type of Request: <input checked="" type="checkbox"/> New <input checked="" type="checkbox"/> Multi-Year <input type="checkbox"/> Renewal <input type="checkbox"/> Amendment <input type="checkbox"/> Increase			
Renewal Year: N/A		Did vendor provide a sole source affidavit? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes, please attach	
Board Date: 7/19/2022	ASR Number: 22-000591	If not scheduled to go to the Board explain why?	
Does Contract include Non-Standard Language? If yes, explain in detail. No			
Was Contract Approved by Risk Mgmt.? No, contract has standard county terms and no revisions to insurance provisions.		Was Contract Approved by County Counsel? Pending County Counsel review	
Were any exceptions taken? If yes, explain in detail. No exceptions were taken.			
<input 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>			





# Procurement

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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 a human service contract for the operations of the Homekey Program 2 - the next phase in the State's response to serve people experiencing or at risk of homelessness and are also at risk of serious illness from COVID-19.

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.*

The Homekey Program will provide temporary interim housing for individuals experiencing homelessness in the Central Service Planning Area of Orange County.

In support of the Homekey Program, AFH will provide: property management, oversight of the daily operations, connect participants to supportive services, community linkages to health and wellness programs, daily meals, transportation to essential appointments, laundry facility access, site maintenance & repair, janitorial, and onsite 24/7 security services.

Additionally, AFH will address the complex needs and challenges specific to each program participant and collaboratively create a plan of action to ensure self-sufficiency and transition to permanent housing.

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.)*

Through the RFI process, AFH was the vendor selected to serve as the co-applicant for Homekey due to having site control of the identified motel. In the case that the vendor was not available to perform the tasks required within the project, the County would have to work collaborative with the City of Huntington Beach and identify another developer through the RFI process. It is not in the County's best interest to identify another developer as the County risks losing the identified site and state funding because the funding application's requirements indicate the need to purchase the identified motel sites by May 2022. The goal would be to identify another potential developer that possessed similar experience in developing and operating projects designed to serve individuals experiencing homelessness.

Given the site control by AFH, they are the only vendor able to move forward with this project.



# OC Procurement

## Sole Source Request Form

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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.

These services are not commensurate with any other vendors since American Family Housing is a co-applicant for the Homekey Program, and the County is unable to partner with any other vendor for this specific motel project.

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

Attach additional sheet if necessary.

If not approved, the County can potentially lose out on the ability to increase non-congregate interim housing and permanent housing capacity in the County. The award announcements for the motel were made in early February 2022.

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

Through the normal County of Orange vetting process, American Family Housing has had no name changes within the last seven (7) years. They do have one (1) judgement and three (3) pending litigation items on public record, none of which are of any major significance to the County and immaterial to their delivery of the services described above.

**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.

Not applicable

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

Attach additional sheet if necessary.

Not applicable



## Sole Source Request Form

Sole Source Bidsync # 017-2224201-NS-SS


### SECTION IV – AUTHOR/REQUESTOR

Signature:  DocuSigned by: A793CE27153E4B7...	Print Name: Karen Betances	Date: 6/20/2022
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### SECTION V – CEO Human Resource Services APPROVAL (Review and approval is required when vendor is a Retired, Former Employee.)

Signature:	Print Name:	Date:
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### SECTION VI – DEPUTY PURCHASING AGENT CONCURRENCE

Signature: 	Print Name: Helen Hernandez	Date: 6/20/2022
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### SECTION VII – DEPARTMENT HEAD APPROVAL

Signature:  DocuSigned by: C3F502080A0B46A...	Print Name: Doug Becht	Date: 6/20/2022
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### SECTION VIII – COUNTY PROCUREMENT OFFICE

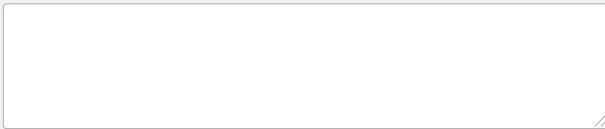
Prior to execution of a contract, the County Procurement Officer or designee shall approve All Sole Source requests for Commodities that exceed \$250,000, Capitol Assets and services exceeding \$75,000, and All other Sole Source requests that require Board approval despite the amount. Approvals are obtained 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:      Date:		CFO Authorized Signature:      Date:	

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### Release Bid Workflow



#### Bid Information

**Bid Number:**

[017-2224201-NS-SS](#)

**Bid Title:**

SOLE SOURCE - AMERICAN FAMILY HOUSING-  
HOMEKEY AFH - PROGRAM 2

#### Status

**Status:**

Approved

[View Workflow History](#)

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

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