



JUSTIFICATION FOR EXCEPTIONS TO COMPETITIVE PROCUREMENT

It is the policy of the Board that the County conduct an open, fair and full competitive solicitation process for the procurement of goods and/or services, with exemptions for certain goods, services and classes of procurement, and case-by-case exceptions, subject to a detailed review and approval process. The residents of Santa Clara County are best served when sound business decisions are made through a full and open competitive bidding processes. There may be certain instances when exceptions are warranted and justifiable. When a County agency/department recommends that competitive bidding is not practicable or in the best interest of the tax payers, appropriate justification supporting an exception must be submitted to the Procurement Department. Should you have any questions, please do not hesitate to contact: Matthew Hada, Director of Procurement at (408) 491-7401.

Date of Submission:	8/29/2023
Submit Document via Requisition	Refer to the Contact and Commodity Assignment List for buyer code guidance.

SECTION I

Proposed Contractor/ Consultant:	Exemplar Human Services, LLC				
Total Estimated Value of the Award:	\$ 700,000.00	Start Date:	11/01/2023	End Date:	06/30/2025
Description of Good/Service:	Reporting Tools and Services				
User Budget Unit - Agency/Dept:	0501 - Social Services Agency	Agency/Dept Abbreviation:	SSA		
Name of Requestor:	Angela Shing/Jennifer Nhem	Phone #:	755-7830		

SECTION II

Mark appropriate box for Contract's Signature Authority

<input checked="" type="radio"/>	Board of Supervisors
<input type="radio"/>	Delegated to Department Head or designee
<input type="radio"/>	Director of Procurement

SECTION III

Pursuant to Board Policy 5.6.5.1 (D)(2), the following are **EXCEPTIONS** to competitive bidding. Select the appropriate exception. *Agencies/ Departments requesting an Exception must provide documentation to establish there is only one source or it is otherwise in the County's best interest to waive the required bidding procedures.*

<input checked="" type="radio"/>	Sole Source: Pursuant to Board Policy 5.6.5.1 (D)(2)(a)(i) a Sole Source Procurement is a sourcing method used to procure a service without competition when it has been determined that there is only one source for the required service that is capable of meeting the requirements of the acquisition as defined in the Scope of Work or specification.
<input type="radio"/>	Single Source: Pursuant to Board Policy 5.6.5.1 (D)(2)(a)(ii) a Single Source Procurement is a sourcing method used to procure a service from one source, without soliciting competition, even though there are other vendors that can provide the service as defined in the scope of work or specification.

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SECTION III (cont.)



Patent Rights: Pursuant to Board Policy 5.6.5.1(D)(2)(b), competition is precluded because of the existence of patent rights, copyrights, secret processes, control of the basic raw material(s) or similar circumstances, and there is no equivalent item or service.



Absolute Compatibility: Pursuant to Board Policy 5.6.5.1(D)(2)(c), the following are Exceptions to Competitive Procurement for Goods/Professional Services. Select the appropriate exception:

(i) Replacement parts or components for equipment – performs the same function in the equipment.

(ii) Replacement parts or components for equipment – prevent compromise of safety or reliability of product or void or invalidate manufacturer’s warranty or guarantee.

(iii) Upgrades, enhancement or additions to hardware or software - compatibility

SECTION IV

PURPOSE OF THE PURCHASE - Please describe the minimum requirements and the benefits of making the acquisition.

The Social Services Agency (SSA), Department of Employment and Benefit Services (DEBS), is requesting a Sole Source Exception for Exemplar Human Services, LLC (Exemplar) for the provision of Reporting Tools and Services in an amount not to exceed \$700,000 for Fiscal Year (FY) 2024 and FY 2025.

The California Statewide Automated Welfare System (CalSAWS) is the automated welfare business process in California that was to be implemented by all 58 counties in 2023. The implementation of CalSAWS will merge California’s most recent three county-level consortia welfare systems and will support six core programs: California Work Opportunity and Responsibility to Kids (CalWORKs), Supplemental Nutritional Assistance Program (SNAP) known as CalFresh in California, Medi-Cal, Foster Care, Refugee Assistance, and County Medical Services. It encompasses the following functions: eligibility determination, benefit computation, benefit delivery, case management and information management.

With the transition to CalSAWS, DEBS requires productivity reports to assist staff and management to manage and maximize daily operations and processing of tasks. Exemplar creates reports customized to each individual staff member assisting in managing and maintaining productivity. The reports will provide DEBS staff with the data necessary to manage caseloads and productivity levels to meet state mandates.

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SECTION V

MARKET RESEARCH - Please describe your market research and the results thereof. This should include a description of similar sources or products available in the market, if any, and why they are not acceptable.

Exemplar is a unique provider of reporting tools and services in the public human services arena. Their background in all sizes of human services management and information systems has given them a unique perspective and expertise. Unlike other Information Technology or systems vendors, they have a thorough understanding of the program operations of county welfare departments. Exemplar is the only vendor that provides a highly customizable reporting services solution via their clients' preferred method of delivery, with development input and oversight by Exemplar's human services policy and practice experts. In addition, Exemplar is the only vendor that can turn around any new reporting or other change requests in an expeditious manner, a result of their deep knowledge of CalSAWS systems and program operations.

Exemplar has proprietary reporting tools that aligns with their County partners' use of the CalSAWS and CalWIN systems. These reporting tools are complex in nature in part because of their highly customizable nature. These proprietary reporting tools are in place in 16 California county human services agencies that operate with a CalWIN or CalSAWS case management system. The reporting tools include, but are not limited to: Intake Productivity, Continuing Productivity, Welfare to Work Productivity, Productivity/ Tele-work, Intake Pending Apps, Continuing Eligibility, Welfare to Work Alerts, and others. All of Exemplar's County partnerships are sole source agreements except one. And the one was a sole source, but became a procurement in which Exemplar was awarded. Additionally, Exemplar is a registered California Multiple Award Schedules (CMAS) contractor (3-19-70-2681B) with the State of California, Department of General Services.

As such, Exemplar is the best organization to provide the services needed due to their unique experience with CalSAWS and ability to provide highly customizable reports with quick turnaround for change requests.

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SECTION VI

BEST INTEREST OF THE COUNTY – Please provide a detailed description as to why a waiver of formal bidding is in the County’s best interest (e.g. product standardization, compatibility, proprietary access or distributorship and the consequences of not doing so. NOTE: A lack of advance planning, loss of funding, or insufficient time are not an acceptable justification for exceptions.)

A waiver of formal bidding to secure a contract with Exemplar for the provision of Reporting Tools and Services is advantageous for the County because of the following reasons:

1. Exemplar has unique experience working with 16 human services agencies throughout California and have a deep knowledge and understanding of the CalSAW system.
2. Exemplar's range of reporting tools allows them to work with clients to create highly customizable reports that can be quickly updated to meet new reporting requirements when needed.
3. A competitive solicitation could result in no proposals and can cause a delay in DEBS' ability to assess their productivity and maximize daily operations.

SECTION VII

FUTURE PLANS - Please describe the actions the department/agency will take to overcome the present barriers to competition prior to any future purchases of this product or service if this exception is approved.

OCM will consult with DEBS to see if there is a continued need for services and, if so, determine whether competitive procurement is appropriate for component of the needed services.



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SECTION VIII

SCOPE OF WORK/SPECIFICATIONS - Please provide all scopes of work or stated specifications. Use an attachment for additional pages. SOW must include these elements: Objective (well-defined, quantifiable expected results include any significant deliverables & milestones) and Scope (what the work should or should not include; brief description of services desired; location of work). Do not include contract language vendor information or pricing.

The SSA DEBS is seeking the services of a contractor to provide Reporting Tools and Services. The services will include, but is not limited to:

1. Produce an Intake Pending Apps Report. This report shall provide a consolidated view of all current pending CalWORKs (CW), CalFresh (CF), Medi-Cal (MC), and Expedited CalFresh (ECF) programs.
2. Produce a Consolidated Eligibility Report. This report shall be a multiple tab consolidated report representing Eligibility related information regarding Intake and Continuing eligibility and caseload management tasks.
3. Produce a Continuing Productivity Report. This report shall be a multiple tab report that provides information on case actions completed by Eligibility Worker staff.
4. Produce an Overtime Productivity Report. This report shall provide information on case actions completed by Eligibility Worker staff during a Saturday overtime session.
5. Produce a Consolidated Welfare to Work (WtW) Alerts Report. This report shall provide multiple reports, for use by County WtW staff, into a single consolidated report.
6. Produce an Office Assistant Productivity Report. This report shall be a multiple tab report that provides information on clerical actions completed by Office Assistant staff.
7. Produce an Office Assistant Overtime Productivity Report. This report shall provide information on clerical actions completed by Office Assistant staff during a Saturday overtime session.
8. Produce an Application Productivity Report. This report shall provide monthly application productivity data for CW, CF, MC, and FC.
9. Produce a Productivity Tele-work Comparison Report. This report shall display the comparison of work completed of staff while in DEBS offices as compared to work completed on their tele-work days.
10. Produce a WtW Productivity Report. This report shall provide information on work completed by WtW staff.
11. Produce an Executive Dashboard. This report shall be a monthly summary of key performance metrics of the DEBS.
12. Provide agreed upon reports in Microsoft Power Business Intelligence (PBI).
13. Provide customization of the reporting tools to your County/Department business needs.
14. Provide unlimited ad-hoc reporting.
15. Provide up to 5 new reports each quarter.

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SECTION IX

Requesting Agency/Department Contracts Manager:	Print Name: Alana Rainville
	Signature: <small>DocuSigned by:</small>  <small>1C2BEA88DBE74EA...</small>
	Phone: 408-755-7510
	Email: alana.rainville01@ssa.sccgov.org

Requesting Agency/Department Director:	Print Name: Jorge Montes
	Signature: <small>DocuSigned by:</small>  <small>728AF1E5C6334BA...</small>

SECTION X

Decision and Required Steps Following Decision (to be completed by OCCM or Procurement)

<input type="radio"/>	Approved	<input checked="" type="checkbox"/> Attach to Legislative File <input type="checkbox"/> Attach to Delegation of Authority Coversheet <input type="checkbox"/> Attach to Service Agreement Checklist <input type="checkbox"/> Attach to PO/Contract File
<input checked="" type="radio"/>	Approved with Conditions	Comments: Approval is for one term only. If SSA needs continued services, Dept is requested to complete an open and competitive (RFP), vendor selection process.
<input type="radio"/>	Additional Information Required	Comments:
<input type="radio"/>	Denied with Recommended Action	Comments:

SECTION XI

Office of Countywide Contracting Management/Procurement Department Signature

<small>DocuSigned by:</small>  <small>CEA090A27EB84EA...</small>	Date: 10/17/2023
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