

Sole Source Justification Request

Yuba County Purchasing and Contract Policy Manual requires purchases to be competitively awarded. Competition is not only our policy, it offers numerous advantages, is a good business practice, and sends a clear message to our community that the County will obtain goods and services through competition in a fair and open manner. Sole source acquisitions must be justified in sufficient detail to explain the basis for suspending the usual competitive procurement process.

How to Request

Except for consultants, sole source requests must be in written form, signed by department head/elected official and attached to purchasing requests when submitted to Administrative Services. Sole source requests for consultants will be approved by the County Administrator's Office.

Describe the item or service, its function, and the total cost estimate (state labor and materials separately):

Current™, is Change and Innovation Agency's (CIA) proprietary Software as a Service (SaaS) delivery platform for Health and Human Services that prioritizes work and delivers it to staff, ensuring as many customers as possible are served with the resources available each day. Customers can apply and receive public assistance benefits timely, often the same day. The customer's experience is improved due to the efficient workflow and the need for multiple contacts are prevented.

- Current™ licenses - 104 annual at \$70 each = \$87,360 annual cost in fiscal year 2023/2024.
- Technical support - to purchase "ad hoc" development/configuration support \$199 an hour, up to the maximum amount of \$40,000 in fiscal year 2023/2024.

Reason for sole source request:

- There is only one known source because:
 - This is a sole provider of a licensed, copyrighted or patented good or service.
 - This is a sole provider of items compatible with existing equipment or systems.
 - This is a sole provider of factory-authorized warranty service.
 - This is a sole provider of goods or services that perform the intended function or meet the specialized needs of the County.
- One source is the only practical way to respond to overriding circumstances that make compliance with competitive procedures under the County's codes and policies not in the best interest of the County.

What steps were taken to verify that these goods or services are not available elsewhere?

- Other brands/manufacturers were examined (List brands and why they were rejected)
- Other suppliers were contacted (List the names and phone numbers and explain why these were not suitable by attached memorandum.)
- Other (Explain by attached memorandum)

BUDGET APPROVAL: YES NO

DEPARTMENT CONTACT PERSON Alex Rodriguez	PHONE 530-749-6386
REQUESTED VENDOR/CONSULTANT NAME Change and Innovation Agency LLC Blake Shaw	VENDOR CONTACT PHONE NUMBER 573-230-7470

Signature of Requestor

Department Head Signature

Approval Signature – IT MANAGER

Approval Signature – PA OR CAO

9/12/2023

Date

6/28/23

Date

9/18/23

Date

9/19/2023

Date

Sole Source Requests

The following represents factors that might justify sole source:

- (1) What capability does the proposed contractor have that is critical to the specific effort and makes the contractor clearly unique compared to other contractors in the same general field?

California Department of Social Services partnered with Change and Innovation Agency, LLC (C!A) and seven California counties (Tulare, Riverside, Orange, Yolo, Sonoma, Contra Costa, Napa and Kern) to redesign business processes to align with the First Contact Resolution model. In 2019 Yuba County met C!A at the County Welfare Directors Association conference sponsored in part by the vendor. Yuba County leveraged the contract C!A had with Los Angeles County to retain their services which included the software, Current™.

- (2) What prior experience of a highly specialized nature does the proposed contractor have that is vital to the proposed effort?

C!A is the industry leader for business process redesign for human services, having redesigned systems for 18 states and counties. C!A's staff are highly experienced and knowledgeable of human services operations as the majority of their consultants were formerly employed in the public sector, from director to eligibility workers. C!A founder, Ken Miller, has been striving to improve public assistance delivery systems since 2002.

- (3) What facilities, staffing, and/or equipment does the proposed contractor have that are specialized and vital to the commodities or services required?

All of C!A staff are process experts who are well-versed in a wide range of social safety-net programs including Medicaid, SNAP, TANF, Long Term Care, General Public Assistance, LIHEAP, WIC, childcare, employment and training, child welfare, and child support.

- (4) Does the proposed contractor have a substantial investment that would have to be duplicated at the county's expense by another contractor entering the field?

Yes, C!A tools, including the Current software, are proprietary and copyrighted. HHS could hire another company to create and implement a new program. This would cost HHS more time and funds to ensure community needs are met in a timely manner and services are not interrupted.

- (5) If schedules are involved, why are they critical and why can the proposed contractor best meet them?

Yuba County HHS is using Current software and would like to renew the licenses that will expire on June 30, 2023 (90-Day Extension Period). Since April 2022, the county has utilized Current™ to streamline processes and make eligibility determinations faster. The average application processing time decreased from 23 days to 6 days. Additionally, resolving the customer's needs at initial contact results in the customers not having to call back and this reduced the average number of calls from 4,000 to 2,500.

- (6) If lack of drawings or specifications is a justification for sole source acquisition, why is only the proposed contractor best able to perform under these conditions? Why are drawings and specifications lacking? How much lead time is required to obtain drawings and specifications suitable for competition?

N/A _____

- (7) Is competition precluded because of the existence of patent rights, copyrights, or secret processes?

Yes, Current™ software is proprietary and copyrighted

- (8) Does this acquisition require compatibility with any existing county equipment?

Not applicable, the County is already utilizing Current™ software.

- (9) What unique characteristics does the equipment or material offered by the proposed contractor possess that are required to meet the county's needs?

The Current™ software integrates with the California statewide automated welfare system (CalSAWS) C!A and specifically assists county workload management of public assistance benefits.

(10) Is competition precluded because of existing equipment maintenance program/contracts?

N/A



September 11, 2023

To: Perminder Bains, Purchasing Agent

From: Tristi Collosi, Administrative Analyst

RE: Addendum to CIA Current™ sole source

What steps were taken to verify that these goods or services are not available elsewhere?

Health and Human Services determined that piggybacking on other county contracts was inappropriate as those counties did not competitively procure their Current™ licenses. Additionally, obtaining the subscriptions from a pre-competed vendor increases county cost by over \$18,000 due to markup by the reseller. Using sole source preserves public funds and meets the specific needs of HHS to connect customers to Public Assistance benefits quickly and efficiently.

