

Report Title: OCA Waiver Details
Run Date and Time: 2021-09-09 09:04:01 Pacific Daylight Time
Run by: Fisher Zhu
Table name: u_oca_waiver

OCA Waiver

Number:	OCAWVR0005045	Request Status:	Completed
Requested for:	Fisher Zhu	State:	Completed
Department Head/Delegated authority:	John Arntz	Waiver Type:	Solicitation Waiver
Opened:	2021-09-08 16:13:36	Awaiting Info from:	
		Awaiting Info reason:	
		Requesting Department:	REG
		Requester Phone:	(415) 553-0725
		Opened by:	Fisher Zhu
		Watch list:	Fisher Zhu, John Arntz

Short Description:

Request for Sole Source Waiver for DFM EIMS Election Management System

Supplier ID:	0000021944	Requested Amount:	\$1,911,000.00
New Request or Modification?:	New	Increase Amount:	\$0.00
Last Approved OCA Waiver Request:		Previously Approved Amounts:	\$0.00
		Total Requested Amount:	\$1,911,000.00

Document Type:	Contract	Enter Contract ID:	
		Enter Requisition ID:	
		Enter Purchase Order ID:	

Commodity:

false

Professional Service:

false

General Service:

false

Describe the product or service:

The San Francisco Department of Elections uses the EIMS election management system produced by DFM Associates to manage election systems such as voter data, polling places, etc. The Department would like to extend the contract with DFM by another ten years. The EIMS system is essential to the Department's capability to run elections in the City.

Regulation 21.5(b): No Other Source:

false

Regulation 21.5(b): No Substitute:

false

Regulation 21.5(c): Perishable foods:

false

Regulation 21.5(d): Proprietary Articles Single Source:

false

Regulation 21.5(e): Pilot Project with a Term :	false
Regulation 21.5(f): Micro LBE Set :	false
Regulation 21.5(g): Federal Funds:	false
Regulation 21.16(b): Reciprocal Agreements :	false
Regulation 21.16(c): Solicitations:	false
Regulation 21.30(d): Software Support:	true
Regulation 21.5(d): Proprietary Articles but More than One Source:	false
Software:	true

OCA Admin

OCA Admin:	Connie Dantes	OCA Supervising Purchaser:	Jonathan Jew
OCA Admin Decision:	Reviewed and approved	OCA Assistant Director:	Taraneh Moayed
OCA Admin Comments:			
For your review/approval.			

OCA Supervising Purchaser

OCA Supervising Purchaser:	Jonathan Jew	Supervising Purchaser Decision:	Reviewed and approved
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Reason for Determination (Supervisor):

The San Francisco Department of Emergency Management (DEM) previously had a ten (10) year contract (CID 100003564) for the EIMS election management system produced by DFM Associates to manage election systems such as voter data, polling places, etc. The EIMS system is essential to the Department's capability to run elections in the City. A sole source waiver was previously granted to DEM, and now they wish to create a new sole source contract with a ten (10) year duration and, based on the quoted annual amount of \$191,100, a contract NTE of \$1,911,000.

Per signed statement from the manufacturer on their letterhead, "...the EIMS software from DFM Associates is proprietary in nature. The right to use, maintenance, and support of the software can only be leased from DFM Associates."

SP Regulation 21.16(b): Reciprocal Agreements :	false
SP Regulation 21.16(c): Solicitations for Multiple Departments:	false
SP Regulation 21.30(d):	true
SP Regulation 21.5(b): No Other Source:	false
SP Regulation 21.5(b): No Substitute – Bid Required:	false
SP Regulation 21.5(b): No Substitute – No Bid Required:	false

SP Regulation 21.5(c): Perishable foods:

false

SP Regulation 21.5(d): Proprietary Articles – Bid Required:

false

SP Regulation 21.5(d): Proprietary Articles – No Bid Required:

false

SP Regulation 21.5(e): Pilot Project with a Term:

false

SP Regulation 21.5(f): Micro LBE Set Asides:

false

SP Regulation 21.5(g): Federal Funds:

false

SP Prop 1:

false

SP Prop 2:

false

SP Prop 3:

false

SP Prop 4:

false

SP Prop 5:

false

SP Prop 6:

false

SP Prop 10:

false

SP Prop 12:

false

OCA Asst./Director

OCA Assistant Director: Taraneh Moayed Asst./Director Decision: Reviewed and approved

Reason for Determination (Asst./Director):

The San Francisco Department of Emergency Management (DEM) previously had a ten (10) year contract (CID 1000003564) for the EIMS election management system produced by DFM Associates to manage election systems such as voter data, polling places, etc. The EIMS system is essential to the Department's capability to run elections in the City. A sole source waiver was previously granted to DEM, and now they wish to create a new sole source contract with a ten (10) year duration and, based on the quoted annual amount of \$191,100, a contract NTE of \$1,911,000.

Per signed statement from the manufacturer on their letterhead, "...the EIMS software from DFM Associates is proprietary in nature. The right to use, maintenance, and support of the software can only be leased from DFM Associates."

DP Regulation 21.16(b): Reciprocal Agreements:

false

DP Regulation 21.16(c): Solicitations for Multiple Departments:

false

DP Regulation 21.30(d):

true

DP Regulation 21.5(b): No Other Source:

false

DP Regulation 21.5(b): No Substitute – Bid Required:

false

DP Regulation 21.5(b): No Substitute – No Bid Required:

false

DP Regulation 21.5(c): Perishable foods:

false

DP Regulation 21.5(d): Proprietary Articles – Bid Required:

false

DP Regulation 21.5(d): Proprietary Articles – No Bid Required:

false

DP Regulation 21.5(e): Pilot Project with a Term:

false

DP Regulation 21.5(f): Micro LBE Set Asides:

false

DP Regulation 21.5(g): Federal Funds:

false

DP Prop 1:

false

DP Prop 2:

false

DP Prop 3:

false

DP Prop 4:

false

DP Prop 5:

false

DP Prop 6:

false

DP Prop 10:

false

DP Prop 12:

false

Regulation 21.5(b1)

Regulation 21.5(b) Question 1:

Regulation 21.5(b) Question 2:

Regulation 21.5(b) Question 3:

Regulation 21.5(b) Question 4:

Regulation 21.5(b) Question 5:

Regulation 21.5(b) Question 6:

Regulation 21.5(b2)

Regulation 21.5(b) No Substitute Question 1:

Regulation 21.5(b) No Substitute Question 2:

Regulation 21.5(b) No Substitute Question 3:

Regulation 21.5(c)

Regulation 21.5(c) Question 1:

Regulation 21.5(d)

Regulation 21.5(d) Question 1:

Regulation 21.5(d) Question 2:

Regulation 21.5(d) Question 3:

Usr Prop 1:

false

Usr Prop 2:

false

Usr Prop 3:

false

Usr Prop 4:

false

Usr Prop 5:

false

Usr Prop 6:

false

Usr Prop 10:

false

Usr Prop 12:

false

Regulation 21.5(d2)

Regulation 21.5(d2) Question 1:

Regulation 21.5(d2) Question 2:

Usrd2 Prop 1:

false

Usrd2 Prop 2:

false

Usrd2 Prop 3:

false

Usrd2 Prop 4:

false

Usrd2 Prop 5:

false

Usrd2 Prop 6:

false

Usrd2 Prop 10:

false

Usrd2 Prop 12:

false

Regulation 21.5(e)

Regulation 21.5(e) Question 1:

Regulation 21.5(e) Question 2:

Regulation 21.5(e) Question 3:

Regulation 21.5(e) Question 4:

Regulation 21.5(e) Question 5:

Regulation 21.16(b)

Regulation 21.16(b) Question 1:

Regulation 21.16(b) Question 2:

Regulation 21.16(b) Question 3:

Regulation 21.16(b) Question 4:

Regulation 21.16(b) Question 5:

Regulation 21.16(b) Question 6:

Regulation 21.16(b) Question 7:

Regulation 21.16(b) Question 8:

Regulation 21.16(b) Question 9:

Regulation 21.16(c)

Regulation 21.16(c) Question 1:

Regulation 21.16(c) Question 2:

Regulation 21.16(c) Question 3:

Regulation 21.30

Regulation 2130 Revised Question 1:

Yes

Regulation 2130 Revised Question 2:

Regulation 2130 Revised Question 3:

Regulation 2130 Revised Question 4:

Regulation 2130 Revised Question 5:

New software not previously purchased:

false

Upgrade of previously purchased software:

false

Standard Support for previously purchased software:

true

Technical Services for previously purchased software:

true

Activities

Additional comments:

Related List Title: Approval List
Table name: sysapproval_approver
Query Condition: Approval for = OCAWVR0005045
Sort Order: Order in ascending order

1 Approvals

State	Approver	Approving	Created	Comments
Approved	John Arntz	OCA Waiver: OCAWVR0005045	2021-09-08 16:15:59	

Related List Title: OCA Waiver List
Table name: u_oca_waiver
Query Condition: Requested for = Fisher Zhu AND Active = true
Sort Order: in ascending order

9 OCA Waivers

Number	Created	Requested for	Supplier ID	Requesting Department	Request Status	Short Description	Total Requested Amount	OCA Admin	OCA Supervising Purchaser	OCA Assistant Director	Address	City
OCAWVR0003742	2020-09-23 11:12:21	Fisher Zhu	0000013846	REG	Completed	Opex Equipment Annual Maintenance	\$21,045.00	Connie Dantes	Linda Repola	Taraneh Moayed		
OCAWVR0003154	2020-04-16 15:32:35	Fisher Zhu	000011876	REG	Completed	Equipment, Maintenance, and Software License	\$711,936.16	Connie Dantes	Linda Repola	Taraneh Moayed		
OCAWVR0003048	2020-03-12 17:06:45	Fisher Zhu	000011876	REG	Completed	Equipment Maintenance and Software License	\$711,936.16	Connie Dantes	Linda Repola	Taraneh Moayed		

Number	Created	Requested for	Supplier ID	Requesting Department	Request Status	Short Description	Total Requested Amount	OCA Admin	OCA Supervising Purchaser	OCA Assistant Director	Address	City
OCAWVR0005045	2021-09-08 16:15:38	Fisher Zhu	0000021944	REG	Completed	Request for Sole Source Waiver for DFM EIMS Election Management System	\$1,911,000.00	Connie Dantes	Jonathan Jew	Taraneh Moayed		
OCAWVR0004408	2021-03-25 17:12:44	Fisher Zhu	000011876	REG	Completed	Equipment Maintenance and Software License	\$878,540.16	Connie Dantes	Jonathan Jew	Taraneh Moayed		
OCAWVR0004289	2021-02-25 13:58:47	Fisher Zhu	0000029723	REG	Completed	Democracy Live Sole Source Waiver Request	\$147,000.00	Connie Dantes	Florence Kyaun	Sailaja Kurella		
OCAWVR0003386	2020-06-16 13:06:58	Fisher Zhu	0000021944	REG	Completed	Request for Waiver for the Purchase of OPEX Machines	\$140,000.00	Connie Dantes	Stacey Lo	Taraneh Moayed		
OCAWVR0004901	2021-08-04 11:51:34	Fisher Zhu	0000021944	REG	Rejected by Supervising purchaser	Request for Sole Source Waiver for DFM EIMS Election Management System	\$1,191,100.00	Richelle Valencia	Jonathan Jew	Taraneh Moayed		
OCAWVR0003415	2020-06-24 10:27:50	Fisher Zhu	0000021944	REG	Rejected by Supervising purchaser	Request for Waiver for DFM EIMS Election Management System	\$1,802,650.00	Connie Dantes	Linda Repola	Taraneh Moayed		

Related List Title: Metric List
Table name: metric_instance
Query Condition: Table = u_oca_waiver AND ID = 9c24b4241b6ab050022454e56e4bcb46
Sort Order: None