



Bid Waiver Form

Short Description of Goods/Services	Case Management
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Date	1/22/2020
Department	Dane County Human Services/ACS Division/Area Agency on Aging
Name	Cheryl Batterman
Email	batterman.cheryl@countyofdane.com
Phone	(608) 261-9789
Purchasing Agent	Carolyn Clow

Vendor Name	Multiple, see below
Vendor MUNIS #	Multiple, see below
Requisition #	Multiple, see below
Requisition Year	2021 - 2025
Total Cost	\$ 5,751,620 - estimated 5 year cost; 2020 cost - \$1,150,324
Vendor Quote Attached	<input type="checkbox"/> Yes – Quote is required to be attached.

Provide a detailed description of the goods/services intended to be purchased:

The Dane County Case Management Program provides financially eligible older adults (above 240% FPL) the support they need to achieve and maintain optimum independence in their community through the assessment of need and the coordination and monitoring of community-based services. Using this assessment, the case manager and the client work together to develop a plan that provides services in the most culturally appropriate, efficient, and effective manner. Vendors are required to report client data and service hours on a monthly basis and meet with clients at least annually.

Vendor Name	Munis #	Req #	2020 Allocation
City of Fitchburg	1383	644	\$44,745
City of Middleton	1386	651	\$45,716
City of Stoughton	1389	664	\$53,995
Colonial Club, Inc.	1469	641	\$124,377
DeForest Area Joint Community Center Commission	8034	643	\$45,125
NewBridge Madison, Inc.	2310	655	\$518,981
Northwest Dane Senior Services, Inc.	13343	656	\$62,181
Senior Citizens Program of Belleville, Exeter, & Montrose, Inc.	778	635	\$41,631
Village of McFarland	8470	650	\$55,613
Village of Mt Horeb	8471	653	\$51,792
Village of Oregon	5904	657	\$38,049
Village of Waunakee	8474	669	\$68,119
TOTAL			\$ 1,150,324



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This funding formula is used (based upon current population data) to determine funding allocated per vendor:

Base	15%
Rural	15%
Population (age 60-74)	10%
Population (age 75-84)	12%
Population (age 85+)	5%
Living Alone (age 65+)	20%
Household Poverty (age 65+)	20%
Minority Population (age 60+)	3 %

Procurement Exception List

- Emergency Procurement
- Only one vendor possesses the unique and singularly available ability to meet the Department's requirements
- Unique and specific technical qualifications are required
- A special adaptation for a special purpose is required
- A unique or opportune buying condition exists

Provide a detailed explanation as to why the competitive bidding (RFB/RFP) process cannot be used. Also provide a detailed justification in relation to the Procurement Exception chosen:



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Dane County Department of Human Services has a long history of investing in and supporting the Senior Focal Point network, which offers a unique opportunity to provide community-based programs and services for senior adults living in Dane County. Case management is a vital component of the available service mix. A limited number of community agencies provide this vital service—which would not be the same without the joint partnerships. In addition, local municipalities and towns of the 12 Senior Focal Points also make significant investments in this program. Contracting with the Focal Points presents a unique buying opportunity as Dane County doesn't fund the full service.

In 2019, Dane County funded 43% of total program costs. Dane County's % funding of total budgets in 2019 by Senior Focal Point was:

City of Fitchburg	29%
City of Middleton	53%
City of Stoughton	30%
Colonial Club, Inc.	79%
DeForest Area Joint Community Center Commission	23%
NewBridge Madison, Inc.	50%
Northwest Dane Senior Services, Inc.	62%
Senior Citizens Program of Belleville, Exeter, & Montrose, Inc.	60%
Village of McFarland	25%
Village of Mt Horeb	41%
Village of Oregon	27%
Village of Waunakee	39%

Bid Waiver Approval (Purchasing Use Only)

Under \$36,000 Controller Approval	Date

\$36,000 or over Personnel & Finance Committee Approval Date	