

THE INFORMATION IN THIS BOX IS NOT A PART OF THE CONTRACT AND IS FOR COUNTY USE ONLY



Contract Number
24-1312

SAP Number

Children and Family Services

Department Contract Representative	Amanda Figueroa
Telephone Number	(909) 386-8146
Contractor	California Health and Human Services Agency, Office of Technology and Solutions Integration
Contractor Representative	Jessie Buan, Contract Manager and Procurement Chief
Telephone Number	(916) 842-1912
Contract Term	January 29, 2025 through April 30, 2028
Original Contract Amount	\$723,942.46
Amendment Amount	N/A
Total Contract Amount	\$723,942.46
Cost Center	
Grant Number (if applicable)	

Briefly describe the general nature of the contract:

Agreement (State Agreement No. 75350059) with California Health and Human Services Agency, Office of Technology and Solutions Integration for the temporary assignment of a San Bernardino County Department of Children and Family Services employee to the Child Welfare Services – California Automated Response and Engagement System project for the period of January 29, 2025, or upon approval by California Department of Technology – Statewide Technology Procurement, whichever is later, through April 30, 2028, or 39 months, whichever is later.

FOR COUNTY USE ONLY

Approved by Legal Form Daniella Hernandez, Deputy County Counsel Date 11/8/2024	Reviewed for Contract Compliance Patty Steven, HS Contracts Manager Date 11/12/2024	Reviewed and Approved by Department Jeany Zepeda, Director Date 11/12/2024
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STATE OF CALIFORNIA
DEPARTMENT OF TECHNOLOGY
STATEWIDE TECHNOLOGY PROCUREMENT
STANDARD AGREEMENT
TECH 213 (rev. 08/2023)

SCO ID: 0531-75350059




AGREEMENT NUMBER
75350059

- This Agreement is entered into between the Contracting Agency and the Contractor named below:
CONTRACTING AGENCY NAME
California Health and Human Services Agency, Office of Technology and Solutions Integration (hereinafter referred to as State or CalHHS OTSI)
CONTRACTOR NAME
San Bernardino County (hereinafter referred to as Contractor)
- The term of this Agreement is: January 29, 2025, or upon approval by CDT-STP, whichever is later, through April 30, 2028, or 39 months, whichever is later
- The maximum amount of this Agreement is: \$723,942.46
Seven Hundred Twenty-Three Thousand, Nine Hundred Forty-Two Dollars and Forty-Six Cents
- The parties agree to comply with the terms and conditions of the following exhibits which are by this reference made a part of the County Subject Matter Expert Agreement for the CalHHS OTSI's CWS-CARES project:

EXHIBIT TITLE	PAGES
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Exhibit C* - General Terms and Conditions (GTC 04/2017)	*
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Exhibit F – Contractor Resume	3
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Items shown with an asterisk (*), are hereby incorporated by reference and made part of this agreement as if attached hereto. These documents can be viewed at <https://www.dgs.ca.gov/OLS/Resources>

IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto.

CONTRACTOR		Department of Technology (CDT), Statewide Technology Procurement (STP) Use Only
CONTRACTOR NAME (If other than an individual, state whether a corporation, partnership, etc.) San Bernardino County		
CONTRACTOR AUTHORIZED SIGNATURE  Jeany Zepeda	DATE SIGNED 1/27/2025	
PRINTED NAME AND TITLE OF PERSON SIGNING Jeany Zepeda, Director		
ADDRESS 150 South Lena Road, San Bernardino, CA 92415-0515		
STATE OF CALIFORNIA		
CONTRACTING AGENCY NAME California Health and Human Services Agency, Office of Technology and Solutions Integration		
CONTRACTING AGENCY AUTHORIZED SIGNATURE  Jim Kammerer	DATE SIGNED 1/30/2025	<input type="checkbox"/> EXEMPT PER:
PRINTED NAME AND TITLE OF PERSON SIGNING Jim Kammerer / Chief Procurement Officer		
CONTRACTING AGENCY ADDRESS 2870 Gateway Oaks, Suite 150, Sacramento CA 95833		

STATE OF CALIFORNIA

AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

☐ CHECK HERE IF ADDITIONAL PAGES ARE ATTACHED

AGREEMENT NUMBER

75350059

AMENDMENT NUMBER

1. CONTRACTOR'S NAME San Bernardino County		2. FEDERAL I.D. NUMBER
3. AGENCY TRANSMITTING AGREEMENT CalHHS Office of Technology and Solutions Integration	4. DIVISION, BUREAU, OR OTHER UNIT Child Welfare Digital Services	5. AGENCY BILLING CODE 006551/006554
6a. CONTRACT ANALYST NAME Ashley Ford	6b. EMAIL ashley.ford@osi.ca.gov	6c. PHONE NUMBER (916) 263-0385
7. HAS YOUR AGENCY CONTRACTED FOR THESE SERVICES BEFORE? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes (If Yes, enter prior Contractor Name and Agreement Number) PRIOR CONTRACTOR NAME: San Bernardino County PRIOR AGREEMENT NUMBER: 75340242		

8. BRIEF DESCRIPTION OF SERVICES

To obtain Subject Matter Expert (SME) services for the Child Welfare Digital Services (CWDS) division of CalHHS Office of Technology and Solutions Integration (CalHHS OTSI).

9. AGREEMENT OUTLINE (Include reason for Agreement: Identify specific problem, administrative requirement, program need or other circumstances making the Agreement necessary; include special or unusual terms and conditions.)

These services are to provide a subject matter expert from San Bernardino County for CWDS. These services are critical to the daily operations for CWDS to carry out its mission and goals for the public welfare of the citizens in the State of California.

10. PAYMENT TERMS (More than one may apply)

- ☐ Monthly Flat Rate ☐ Quarterly ☐ One-Time Payment ☐ Progress Payment
☒ Itemized Invoice ☐ Withhold _____ % ☐ Advanced Payment Not To Exceed _____ or _____ %
☐ Reimbursement / Revenue
☐ Other (Explain)

11. PROJECTED EXPENDITURES

FUND TITLE	ITEM	FISCAL YEAR	CHAPTER	STATUTE	PROJECTED EXPENDITURES
CHHS Automation Fund	531-001-9745	24/25	22	2024	\$69,551.71
CHHS Automation Fund	531-001-9745	24/25	22	2024	\$17,387.93
CHHS Automation Fund	531-001-9745	25/26	TBD	2025	\$170,597.74
CHHS Automation Fund	531-001-9745	25/26	TBD	2025	\$42,649.44
CHHS Automation Fund	531-001-9745	26/27	TBD	2026	\$181,979.59
CHHS Automation Fund	531-001-9745	26/27	TBD	2026	\$45,494.90
CHHS Automation Fund	531-001-9745	27/28	TBD	2027	\$157,024.92
CHHS Automation Fund	531-001-9745	27/28	TBD	2027	\$39,256.23

OBJECT CODE

Account Code: 5340420201

AGREEMENT TOTAL

\$723,942.46

STATE OF CALIFORNIA
AGREEMENT SUMMARY

STD 215 (Rev. 04/2020)

OPTIONAL USE

Project ID: OSI075300000000 & OSI075400000000

Activity ID: OSI075307530000 & OSI075407540100

I certify upon my own personal knowledge that the budgeted funds for the current budget year are available for the period and purpose of the expenditure stated above.

ACCOUNTING OFFICER'S SIGNATURE

DocuSigned by:

Daniel Rowan

ACCOUNTING OFFICER'S NAME (Print or Type)

Daniel Rowan

DATE SIGNED

1/30/2025

12. AGREEMENT

AGREEMENT	TERM FROM	TERM THROUGH	TOTAL COST OF THIS TRANSACTION	BID, SOLE SOURCE, EXEMPT
Original	1/29/2025	4/30/2028	\$723,942.46	EXEMPT
Amendment 1				
TOTAL			\$723,942.46	

13. BIDDING METHOD USED

- ☐ Request for Proposal (RFP) (Attach justification if secondary method is used)
 ☐ Use of Master Service Agreement
☐ Invitation for Bid (IFB)
 ☒ Exempt from Bidding (Give authority for exempt status)
 ☐ Sole Source Contract (Attach STD. 821)
☐ Other (Explain) Contracts with other public entities, (State, Local, or Federal Agency) are exempt. SCM vol. I c.5.80 (A) (5).

Note: Proof of advertisement in the State Contracts Register or an approved form STD. 821, Contract Advertising Exemption Request, must be attached

14. SUMMARY OF BIDS (List of bidders, bid amount and small business status) (If an amendment, sole source, or exempt, leave blank)

N/A

15. IF AWARD OF AGREEMENT IS TO OTHER THAN THE LOWER BIDDER, EXPLAIN REASON(S) (If an amendment, sole source, or exempt, leave blank)

N/A

16. WHAT IS THE BASIS FOR DETERMINING THAT THE PRICE OR RATE IS REASONABLE?

The rates are comparable to other OTSI contracts for County SME services.

17a. JUSTIFICATION FOR CONTRACTING OUT (Check one)

- ☐ Contracting out is based on cost savings per Government Code 19130(a). The State Personnel Board has been so notified.
 ☒ Contracting out is justified based on Government Code 19130(b). When this box is checked, a completed JUSTIFICATION - CALIFORNIA CODE OF REGULATIONS, TITLE 2, SECTION 547.60 must be attached to this document.
☐ Not Applicable (Interagency / Public Works / Other _____)

17b. EMPLOYEE BARGAINING UNIT NOTIFICATION

- ☒ By checking this box, I hereby certify compliance with Government Code section 19132(b)(1).

AUTHORIZED SIGNATURE

SIGNER'S NAME (Print or Type)

DATE SIGNED

Ashley Ford

1/30/2025

18. FOR AGREEMENTS IN EXCESS OF \$5,000: Has the letting of the agreement been reported to the Department of Fair Employment and Housing?

☐ No ☒ Yes ☐ N/A

19. HAVE CONFLICT OF INTEREST ISSUES BEEN IDENTIFIED AND RESOLVED AS REQUIRED BY THE STATE CONTRACT MANUAL SECTION 7.10?

☐ No ☒ Yes ☐ N/A

20. FOR CONSULTING AGREEMENTS: Did you review any contractor evaluations on file with the DGS Legal Office?

☒ None on file ☐ No ☐ Yes ☐ N/A

21. IS A SIGNED COPY OF THE FOLLOWING ON FILE AT YOUR AGENCY FOR THIS CONTRACTOR?

A. Contractor Certification Clauses

B. STD 204 Vendor Data Record

☐ No ☒ Yes ☐ N/A

☐ No ☐ Yes ☒ N/A

22. REQUIRED RESOLUTIONS ARE ATTACHED

☐ No ☒ Yes ☐ N/A

23. IS THIS A SMALL BUSINESS AND/OR A DISABLED VETERAN BUSINESS CERTIFIED BY DGS?

☒ No ☐ Yes

SB/DVBE Certification Number:

24. ARE DISABLED VETERANS BUSINESS ENTERPRISE GOALS REQUIRED? (If an amendment, explain changes if any)

Exempt per SCM vol. I c.5.80 (A) (5)

☒ No (Explain below) ☐ Yes _____ % of Agreement


STATE OF CALIFORNIA
AGREEMENT SUMMARY
STD 215 (Rev. 04/2020)

AGREEMENT NUMBER 75350059	AMENDMENT NUMBER
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25. IS THIS AGREEMENT (WITH AMENDMENTS) FOR A PERIOD OF TIME LONGER THAN THREE YEARS? ☐ No ☒ Yes (If Yes, provide justification below)

The CWDS Project requires that the consultant stay consistent throughout the scope of the project for which their expertise is needed.

I certify that all copies of the referenced Agreement will conform to the original agreement sent to the Department of General Services.

SIGNATURE	DocuSigned by: 	NAME/TITLE (Print or Type) Ashley Ford / Procurement Analyst	DATE SIGNED 1/30/2025
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STATE OF CALIFORNIA AGREEMENT SUMMARY STD 215 (Rev. 04/2020)	AGREEMENT NUMBER 75350059	AMENDMENT NUMBER
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JUSTIFICATION - CALIFORNIA CODE OF REGULATIONS, TITLE 2, SECTION 547.60

In the space provided below, the undersigned authorized state representative documents, with specificity and detailed factual information, the reasons why the contract satisfies one or more of the conditions set forth in Government Code section 19130(b). Please specify the applicable subsection. Attach extra pages if necessary.

Please see attached GC.19130

<i>The undersigned represents that, based upon his or her personal knowledge, information or belief the above justification correctly reflects the reasons why the contract satisfies Government Code section 19130(b).</i>			
SIGNATURE	NAME/TITLE(Print or Type)	DATE SIGNED	
PHONE NUMBER	STREET ADDRESS		
EMAIL	CITY	STATE	ZIP

EXHIBIT A SCOPE OF WORK

1. GENERAL

This Agreement is entered into by and between the California Health and Human Services Agency, Office of Technology and Solutions Integration, hereinafter referred to as the "CalHHS OTSI" or the "State," and San Bernardino County, hereinafter referred to as the "Contractor." The State and the Contractor, individually as "Party" and collectively as "the Parties," are entering into this Agreement for the purpose of the Contractor to provide Subject Matter Expert (SME) services to the State as described herein.

2. TERM

This Agreement will commence on January 29, 2025, or the date the Agreement is approved by the California Department of Technology, Statewide Technology Procurement, whichever is later (referred to herein as the "Effective Date"), and continue through April 30, 2028, or 39 months, whichever is later.

Upon mutual written agreement, the Parties may extend the term of this Agreement for up to two (2), one (1) year optional extensions at the originally agreed-upon costs specified in Exhibit B, Budget Detail and Payment Provisions.

3. COST

The total cost of this Agreement shall not exceed \$723,942.46. Cost details are located in Exhibit B – Budget Detail and Payment Provisions.

4. WORK LOCATION AND HOURS OF SERVICES

Contractor staff (also referred to herein as "County Employee") is required to perform all services under this Agreement at the Child Welfare Services-California Automated Response and Engagement System (CWS-CARES) Project (hereinafter referred to as "Project") office located at 2870 Gateway Oaks Drive, Sacramento, CA 95833, and San Bernardino County, as agreed upon by the Parties. The County Employee may telework from their home office or other locations, as approved by the State. The County Employee may also work at other project sites, State offices, or meeting locations during the term of this Agreement within the greater Sacramento area. Any travel related expenses incurred by the County Employee when required to travel to a State specific location to fulfill the terms of this Agreement shall be subject to reimbursement by the State to the Contractor as described in Exhibit B, Section 1.F. Duties may require the County Employee to travel occasionally to other locations throughout the State as directed by the State Project Manager Office Director or its designee.

With the exception of state and county holidays, the contracted services shall be provided during normal, state business days between the hours of 8:00 a.m. to 5:00 p.m. Pacific Time, unless otherwise authorized in writing by the State Project Manager Office Director or its designee.

In order to meet deadlines specified within the Child Welfare Digital Services (CWDS) Master Project Schedule, it may be necessary for Contractor staff to adjust their working schedule to attend meetings and/or perform services.

5. SCOPE OF RESPONSIBILITIES

The County Employee shall not work more than 180 hours per month without prior State written approval.

County Employee tasks shall be performed in accordance with the deadlines set forth in the CWDS Master Project Schedule, which is incorporated by reference herein and located in the Project's SharePoint site. Deadlines within the CWDS Master Project Schedule may be changed by the State, at its sole discretion, to meet the needs of the Project. The tasks listed in Section 5 may be further detailed and overseen in accordance with the Vendor Management Plan by the State Functional Manager, and progress is managed through Jira, the Project's designated project management tool, and the CWDS Master Project Schedule. These tools allow for visibility into task progression and completion through a variety of reporting capabilities.

Under the general direction of the State Project Manager Office Director or its designee, the County Employee shall perform county subject matter expertise work related to the Project. The County Employee shall provide the following services:

Task No.	Task Description
Task 1 – Task Management	
1.1	Monthly Status Report Prepare and submit Monthly Status Reports (MSRs) using the template provided by the State. The MSRs shall include the following: <ul style="list-style-type: none">• Description of planned and unplanned activities in the reporting month;• Description of activities scheduled in the coming month;• Identification of any concerns and/or issues; and• Identification of detailed tasks from the Scope of Work (SOW). (Due: Monthly, by the fifth business day of each month)
1.2	Final Report Prepare and submit a Final Report using the template provided by the State documenting Agreement results. The Final Report shall include the following: <ul style="list-style-type: none">• Summary of all SOW activities;• Deliverables;• Milestone accomplishments;• Lessons learned; and• Actual contract expenditures versus planned expenditures. (Due: As requested by the State)
Task 2 – Communication Management	
2.1	Identify stakeholder communication needs regarding the CWS-CARES development, policy, and operations.
2.2	Coordinate and facilitate county staff involvement in implementation-related activities.

Task No.	Task Description
2.3	Attend meetings as approved by CWDS management, which may include county meetings, regional meetings, and County Welfare Directors Association (CWDA) meetings, to provide input and status on decisions and resolutions to issues.
2.4	Provide content to update the CWDS website and other electronic tools.
2.5	Meet with stakeholders, staff, end users, and other appropriate persons from various private and/or governmental organizations for the purposes of problem identification and resolution, inclusion of program and technical policy and regulation, and procedure development.
2.6	Prepare and deliver presentations for stakeholders as needed or requested by CWDS management.
2.7	Assist in developing All County Letters and Informational Notices and provide suggested changes to program descriptions, needs, or outcomes.
2.8	Review and provide comment on all solution training materials developed by other vendors.
2.9	Identify risks and issues that arise during the design, development, and implementation of the CWS-CARES.
2.10	Travel as necessary to attend meetings, obtain training, and assist in the implementation of the CWS-CARES and other project activities, as approved by CWDS management.
Task 3 – Child Welfare Services Subject Matter Expertise Services	
3.1	Analyze legislation, regulations, and county decisions for impacts to the CWS-CARES.
3.2	Provide input on gaps and needs within the CWS-CARES Service Delivery Life Cycle and provide recommendations to address programmatic problems or issues as they arise.
3.3	Assist with research, analysis, and development of solutions for highly complex business or technical issues or problems identified during the development and implementation of the CWS-CARES.
3.4	Act in the capacity of a SME to ensure the development and implementation of the CWS-CARES incorporates county business practice, processes, and procedures.
3.5	Recommend new or amended processes and methods as a result of emerging technologies to achieve end user satisfaction.
3.6	Assist in developing or revising project documentation related to solution development and implementation activities with an emphasis on program descriptions, needs, or outcomes.
3.7	Ensure the development and implementation of the CWS-CARES meets county program, fiscal, technical, and business needs.
Task 4 – Procurement Support Services	
4.1	Participate in developing, reviewing, and revising procurement-related documentation.
4.2	Conduct impact analyses on proposed requirement changes.
4.3	Participate in developing and reviewing revisions to the Product Blueprint, Product Roadmap, user stories, business and technical requirements,

Task No.	Task Description
	business process workflows, and associated procurement artifacts to ensure they remain in alignment with current policy and legislation.
4.4	Develop responses to vendor questions to clarify business or technical requirements.
4.5	Provide support during assessment of vendor offers.
Task 5 – CWS-CARES Development and Implementation Support Services	
5.1	Participate as a SME throughout the CWS-CARES Service Delivery Life Cycle (i.e., Context Setting, Prioritization, Discovery, Prototyping, Iterative Build, Deployment to Sandbox, and Deployment to Production).
5.2	Participate in project planning activities including all CWS-CARES Service Delivery Life Cycle Phases, sprint planning, sprint retrospective and related efforts for the development and implementation teams.
5.3	Collaborate with all project state and vendor resources to develop a clear understanding and empathy for end users, answer questions about the service, analyze existing research, and conduct additional research, as required.
5.4	Interpret user insight and performance data to assist in all CWS-CARES Service Delivery Life Cycle Phases.
5.5	Assess Work Order Authorizations (WOAs) and deliverables to ensure they meet blueprinting requirements for specified milestones, CWDS Playbook standards, and all stakeholder training and implementation requirements, and are consistent with the Product Roadmap.
5.6	Act in the capacity of a SME utilizing user-centered design principles to identify business intelligence impacts, analytics, quality assurance methods, and reports to be produced by the CWS-CARES.
5.7	Participate in testing activities related to the CWS-CARES Service Delivery Life Cycle and respond to any questions or concerns, as required. Activities include, but are not limited to: <ul style="list-style-type: none"> • Collaborating with quality assurance engineers to develop test plans; • Executing test cases (manual or automated) and analyzing results; • Documenting testing phases and defects; • Reporting defects and errors; • Assisting in issue resolution; and • Participating in post-release/post-implementation testing.
5.8	Clarify and articulate the diverse requirements of end users to support the effective delivery of the CWS-CARES.
5.9	Identify changes that quickly transform the flexibility, responsiveness, and quality of the CWS-CARES allowing CWDS management to make quick, confident decisions at a strategic level.
5.10	Act as an advocate for the transformation of services, promoting progress, and publicizing learning.

Task No.	Task Description
5.11	Gather and report detailed performance data against key performance indicators to generate actionable improvements to the quality of services offered by the CWS-CARES.
5.12	Analyze data from various sources and recognize when to bring in experts/researchers to validate or add to available information.
5.13	Participate in the CWS-CARES implementation by preparing end users for the transition from the Child Welfare Services/Case Management System to the CWS-CARES.
5.14	Assist in state and federal compliance review(s).
Task 6 - Additional Subject Matter Expertise Services	
6.1	<p>Act in the capacity of a SME and perform as-needed tasks related to the following specific service areas:</p> <ul style="list-style-type: none"> • Ensure the development and implementation of the CWS-CARES incorporates county business practices, processes, and procedures. • Provide input on gaps and needs within the CWS-CARES Service Delivery Life Cycle and provide recommendations to address programmatic problems or issues as they arise. • Conduct impact analyses on proposed requirement changes. • Product Blueprinting: Perform tasks related to identifying and validating CWS-CARES scope identified in the CARES Product Blueprint. • Building Block refinement: Perform tasks related to providing additional detail to existing CWS-CARES building blocks and identifying additional building blocks as required. • Service map refinement: Perform tasks related to providing additional detail to existing service map areas. • Participant in core county meetings: Attend core county meetings and participate in discussions as a subject matter expert.
Task 7 – Unanticipated Tasks	
7.1	Perform as-needed tasks and services, such as ad hoc issue papers, briefings, presentations, analysis, etc.

6. DOCUMENTS

A. Document Format

- 1) All documents shall be provided in a format compatible with the CalHHS OTSI Project Office standard applications (currently, Microsoft Office 2016). In all cases, the Contractor shall verify application compatibility with the State Contract Manager prior to creation or delivery of any document. Any deviations to these standards shall be approved by the CalHHS OTSI Information Technology Office (ITO) and Information Security Office (ISO).

- 2) The delivery media shall be compatible with the State storage devices.
- 3) If the State does not accept the work product(s) or services in the executed Agreement, payment for the work product(s)/services shall be withheld by the State, and the Contractor will be notified. The Contractor shall take timely and appropriate measures to correct or remediate the reason(s) for non-acceptance and demonstrate to the State that the Contractor has successfully completed the scheduled work for each work product/service before payment is made.

B. Media and Number of Copies

One (1) electronic copy of the deliverable is to be submitted to:
cwdsdeliverables@osi.ca.gov.

7. CONTACTS

The Parties' representatives during the term of this Agreement shall be as set forth below. Each Party may change its own contact information by giving written notice to the other Party. Said changes shall not require an amendment to this Agreement.

Contractor – Contract Manager:	
Name, Title:	Adam Arentz, Administrative Supervisor II
Address:	150 South Lena Road, San Bernardino, CA 92415-0515
Telephone Number:	(909) 387-2821
Email Address:	Adam.Arentz@hss.sbcounty.gov

State – Contract Manager:	
Name, Title:	Jessie Buan, Contract Manager and Procurement Chief
Address:	2870 Gateway Oaks Drive, Suite 230 Sacramento, CA 95833
Telephone Number:	(916) 842-1912
Email Address:	Jessie.Buan@osi.ca.gov ; cc: CWDSContracts@osi.ca.gov

8. SUBSTITUTE PERSONNEL

- A. In the event that the Contractor's assigned personnel is unable to perform their duties due to illness, resignation, other factors beyond the Contractor's control, or upon mutual agreement of the Parties, the Contractor shall make every reasonable effort to provide suitable substitute personnel. If the Contractor is unable to provide a substitute, or if the State does not approve of the substitute, either the Contractor or the State may terminate this Agreement with a 30-day advance written notice.
- B. To add or substitute Contractor personnel, the Contractor shall submit an Add, Delete or Substitute Contractor Staff Request Form (form to be provided by the State) and the résumé of a suitable replacement to the State. The additional or substitute personnel shall meet all the requirements set forth in this Agreement and must be approved by the State in writing prior to starting work. The State will provide a written disposition of the request within ten (10) State business days after receipt of these documents. The State reserves the right to interview all proposed additional or

substitute personnel prior to its issuance of consent. The Contractor shall not add or substitute personnel without the prior written consent of the State, which consent shall not be unreasonably withheld.

- C. Additional or substitute Contractor personnel shall not automatically receive the compensation of the individual or positions being replaced. The State and the Contractor shall negotiate the compensation of any additional or substitute personnel to the Agreement. The compensation negotiated shall be dependent, in part, upon the experience and individual skills of the proposed additional or substitute personnel. The negotiated compensation shall not exceed the compensation for that position as set forth in the Agreement.
- D. If the addition or substitution of Contractor personnel does not increase the total cost of the Agreement, no amendment shall be required to make this change(s) to the Agreement.

9. EXECUTIVE ORDER N-6-22 – RUSSIA SANCTIONS

On March 4, 2022, Governor Gavin Newsom issued Executive Order N-6-22 (the EO) regarding Economic Sanctions against Russia and Russian entities and individuals. "Economic Sanctions" refers to sanctions imposed by the U.S. government in response to Russia's actions in Ukraine, as well as any sanctions imposed under state law. The EO directs state agencies to terminate contracts with, and to refrain from entering any new contracts with, individuals or entities that are determined to be a target of Economic Sanctions. Accordingly, should the State determine Contractor is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for termination of this agreement. The State shall provide Contractor advance written notice of such termination, allowing Contractor at least 30 calendar days to provide a written response. Termination shall be at the sole discretion of the State.

10. MANDATORY GENERATIVE ARTIFICIAL INTELLIGENCE (GenAI) REQUIREMENTS

During the term of the contract, Contractor must notify the State in writing if their services or any work under this contract includes, or makes available, any previously unreported GenAI technology, including GenAI from third parties or subcontractors. Contractor shall immediately complete the GenAI Reporting and Factsheet (STD 1000) to notify the State of any new or previously unreported GenAI technology.

At the direction of the State, Contractor shall discontinue the use of any new or previously undisclosed GenAI technology that materially impacts functionality, risk or contract performance, until use of such GenAI technology has been approved by the State.

Failure to disclose GenAI use to the State and submit the GenAI Reporting and Factsheet (STD 1000) may be considered a breach of the contract by the State at its sole discretion and the State may consider such failure to disclose GenAI and/or failure to submit the GenAI Reporting and Factsheet (STD 1000) as grounds for the immediate termination of the contract. The State is entitled to seek any and all relief it may be entitled to as a result of such non-disclosure.

The State reserves the right to amend the contract, without additional cost, to incorporate GenAI Special Provisions into the contract at its sole discretion and/or terminate any contract that presents an unacceptable level of risk to the State.

**EXHIBIT B
BUDGET DETAIL AND PAYMENT PROVISIONS**

1. INVOICING AND PAYMENT

- A. The amounts listed below by State Fiscal Year (SFY) are estimates. The State may adjust the dollar amounts in any SFY so long as the total dollar amount of the Agreement is not exceeded.

Core Term				
SFY	24/25	25/26	26/27	27/28
Months	Jan-June	July-June	July-June	July - April
# of Months	5	12	12	10
Salary (Includes 3-5% Cost of Living Adjustment based on the current union MOU. Subject to change based on negotiation of future MOUs.)	\$ 49,270.68	\$ 120,980.62	\$ 129,449.26	\$ 111,874.04
Benefits	\$ 19,138.11	\$ 46,992.26	\$ 50,281.72	\$ 43,455.01
Overhead	\$ 14,365.85	\$ 35,274.30	\$ 37,743.51	\$ 32,619.10
Travel	\$ 4,165.00	\$ 10,000.00	\$ 10,000.00	\$ 8,333.00
Total	\$ 86,939.64	\$ 213,247.18	\$ 227,474.49	\$ 196,281.15
Core Term Total	\$ 723,942.46			

Option Year 1			Option Year 2	
SFY	27/28	28/29	28/29	29/30
Months	May-June	July-April	May-June	July-April
# of Months	2	10	2	10
Salary (Includes 3-5% Cost of Living Adjustment based on the current union MOU. Subject to change based on negotiation of future MOUs.)	\$ 26,636.68	\$ 119,705.22	\$ 28,501.24	\$ 128,084.58
Benefits	\$ 10,346.43	\$ 46,496.86	\$ 11,070.68	\$ 49,751.64
Overhead	\$ 7,766.45	\$ 34,902.44	\$ 8,310.10	\$ 37,345.61
Travel	\$ 1,666.00	\$ 8,333.00	\$ 1,666.00	\$ 8,333.00
Total	\$ 46,415.56	\$ 209,437.52	\$ 49,548.02	\$ 223,514.83
Option Years Totals	\$ 255,853.08		\$ 273,062.85	

Exhibit B – Budget Detail and Payment Provisions

- B. For services satisfactorily rendered, and upon receipt and approval of the invoice(s), the State agrees to compensate the Contractor for actual expenditures incurred according to Section 1(A) above.
- C. In no event shall the Contractor request or be entitled to reimbursement from the State for obligations entered into or for cost(s) incurred prior to the effective date or after this Agreement terminates.
- D. Invoices shall be submitted monthly, in arrears, not later than thirty (30) calendar days after the end of the billing period. Invoices must include the following:
 - 1) Invoice with the Agreement number;
 - 2) A certification statement that is signed by a company official, attesting to the accuracy of the invoice data and includes that company official's phone number and email address;
 - 3) Copies of signed timesheet(s) or other documentation supporting that the State has provided approval for the items invoiced; and
 - 4) The start and end dates for the service period covered in the invoice. If an invoice service period crosses between State fiscal years, the Contractor shall provide an invoice for each State fiscal year. The State fiscal year is July 1 to June 30.
- E. Invoices may be submitted electronically via email or by mail.
 - 1) Invoices submitted electronically shall be emailed to: AccountsPayable@osi.ca.gov. Electronic submissions must:
 - a) Be submitted individually. The CalHHS OTSI will not accept multiple invoices submitted in a single email.
 - b) Contain the following in the Subject line:
 - (i) Company Name
 - (ii) Agreement Number
 - (iii) Invoice Number
 - c) Be in PDF format and include all of the supporting documentation as required in this Agreement.
 - 2) Invoices submitted by mail shall be sent directly to the following address. Hard copies must be submitted in triplicate and include all of the supporting documentation as required in this Agreement.

CalHHS Office of Technology and Solutions Integration
Attn: Accounting Office
2870 Gateway Oaks Dr., Ste. 150
Sacramento, CA 95833
- F. The State will allow for travel costs, which includes reimbursement for the County Employee's travel, per diem, lodging, etc. The travel costs shall not exceed the State rates current at the time of order placement and shall be made in accordance with the provisions established in the California Department of Human Resources (CalHR) Human Resources Manual (e.g., section 2203) and any applicable CalHR travel

regulations (Cal. Code Regs., tit. 2, § 599.615 et seq.), as applied to excluded employees and limited to actual costs incurred. The State shall approve all travel in advance. All State approved travel costs accrued by the County Employee from fulfilling the terms of this Agreement shall be reimbursed directly to the Contractor from the State. Reimbursement for travel-related costs shall be made upon approval of a Travel Expense Claim (TEC) with receipts substantiating travel costs, as required. A TEC shall also be submitted with substantiating receipts for any travel costs directly paid for by the State. TECs shall be submitted not more frequently than after each travel occurrence and no less than quarterly in arrears. The State shall not bear any responsibility for any tax liabilities on reportable and taxable travel expenditure reimbursements to the Contractor or County Employee.

- G. Payment by the State to the Contractor for the reimbursement of the County Employee's benefits during the term of this Agreement, as specified in the Exhibit B, Budget Detail and Payment Provisions, shall not in any way obligate the State to pay or reimburse the Contractor, or incur any liability, for any specific claims or benefits which may arise under applicable laws during the performance of services under this Agreement, including but not limited to workers' compensation, disability, or unemployment, except as otherwise required by law or court order.

2. BUDGET CONTINGENCY

- A. It is mutually agreed that if the Budget Act of the current year and/or any subsequent years covered under this Agreement does not appropriate sufficient funds for the program, this Agreement shall be of no further force and effect. In this event, the State shall have no liability to pay any funds whatsoever to the Contractor or to furnish any other consideration under this Agreement, and the Contractor shall not be obligated to perform any provisions of this Agreement.
- B. If funding for any fiscal year is reduced or deleted by the Budget Act for purposes of this program, the State shall have the option to either cancel this Agreement with no liability occurring to the State or offer an agreement to the Contractor to reflect a reduction in the amount.

3. CONTRACT WITH FEDERAL FUNDS

- A. It is mutually understood between the Parties that this Agreement may have been written before ascertaining the availability of Congressional appropriation of funds, for the mutual benefit of both Parties, in order to avoid program and fiscal delays that would occur if the Agreement were executed after that determination was made.
- B. This Agreement is valid and enforceable only if sufficient funds are made available to the State by the United States Government for the term of this Agreement for the purposes of this program. In addition, this Agreement is subject to any additional restrictions, limitation, or conditions enacted by the Congress or any statute enacted by Congress that may affect the provisions, terms, or funding of this Agreement in any manner.

- C. It is mutually agreed that if Congress does not appropriate sufficient funds for the program, the State shall have the option to either cancel this Agreement with no liability occurring to the State or offer an agreement to the Contractor to reflect a reduction in the amount.

4. PROMPT PAYMENT CLAUSE

Payment will be made in accordance with, and within the time specified in, Government Code Chapter 4.5, commencing with section 927.

5. TIMELY SUBMISSION OF FINAL INVOICE

- A. A final undisputed invoice that is clearly marked "Final Invoice" shall be submitted for payment no more than thirty (30) calendar days following the expiration or termination date of this Agreement.
- B. If the State disputes the Final Invoice or any item in the Final Invoice, the State shall provide written notice to the Contractor describing the reason or reasons the State disputes the Final Invoice, and the Contractor shall be required to submit a corrected Final Invoice to the State no later than ten (10) calendar days after the date the Contractor received the State's written notice.
- C. If the Contractor fails to submit a corrected Final Invoice within the time required, or if the Contractor's corrected Final Invoice fails to correct the disputed item, the State shall have the right to elect to deny payment of the disputed item and pay only the undisputed amounts under the Final Invoice.
- D. The State may, at its discretion, choose not to honor any final invoice submitted after the deadline specified in Section 5(A) above if the Contractor fails to obtain prior written State approval of an alternate Final Invoice submission deadline.

EXHIBIT D SPECIAL TERMS AND CONDITIONS

1. PERFORMANCE COMMENCEMENT

This Agreement is of no force and effect until signed by both Parties, and approved by the California Department of Technology, Statewide Technology Procurement if required. Performance may not commence until such approval has been obtained.

2. TERMINATION WITHOUT CAUSE

The Agreement may be terminated by either Party without cause upon thirty (30) calendar days' prior written notice to the other Party.

3. AMENDMENTS

The Parties may amend this Agreement as permissible by law. If the identified services included in the Agreement are not completed within the term and unspent funds remain in the Agreement, the State may exercise its option to extend the term of the Agreement for up to one (1) year at no additional cost.

4. DEBARMENT AND SUSPENSION

For federally funded agreements in the amount of \$100,000 or more, by signing this agreement, Contractor certifies that to the best of its knowledge and belief that the Contractor and its principals or affiliates or any subcontractor utilized under this Agreement, are not debarred or suspended from federal financial assistance programs and activities nor proposed for debarment, declared ineligible, or voluntarily excluded from participation in covered transactions by any federal department or agency. The Contractor also certifies that it or any of its subcontractors are not listed with any active exclusions on the System for Award Management (<http://www.sam.gov>) (Executive Order 12549, 2 C.F.R. Parts 180, 376, 417 and 2336).

5. CERTIFICATION REGARDING LOBBYING

For agreements with contractors who are state entities under the authority of the Governor, or counties, cities, private firms or agencies that are receiving in excess of \$100,000 in federal funds from the State of California to perform services, the Contractor agrees to sign and submit to the State the Certification Regarding Lobbying form, which shall be provided by the State (section 1352, Title 31 of the U.S. Code).

6. OFFICE OF MANAGEMENT AND BUDGET AUDIT

Pursuant to Office of Management and Budget (OMB) audit requirement regulations (2 C.F.R. § 200.501), non-federal entities that expend \$750,000 or more in a year in federal awards from all sources combined shall have a single or program-specific audit conducted for that year in accordance with the provisions of 2 C.F.R. § 200.514 (previously OMB Circular A-133). All OMB audit reports shall meet the report submission requirements established in 2 C.F.R § 200.512 and a copy shall be forwarded to the State.

7. SETTLEMENT OF DISPUTES

In the event of a dispute, the Contractor shall file a written dispute notice with the State Project Manager Office Director within ten (10) State business days after discovery of the problem. Pending resolution of any dispute, the Parties shall continue to perform under this Agreement, and Contractor shall diligently continue all work and comply with all of the State Project Manager Office Director's orders and directions.

- A. The written dispute notice shall contain the following information:
 - 1) The decision under dispute;
 - 2) The reason(s) the Contractor believes the decision in dispute to have been in error (if applicable, reference pertinent Agreement provisions);
 - 3) Identification of all documents and substance of all oral communications that support the Contractor's position; and
 - 4) The dollar amount in dispute, if applicable.
- B. Upon receipt of the written dispute notice, the State Project Manager Office Director will examine the matter and issue a written decision to the Contractor within ten (10) State business days. The decision shall contain the following information:
 - 1) A description of the dispute;
 - 2) A reference to pertinent Agreement provisions, if applicable;
 - 3) A statement of the factual areas of the agreement or disagreement; and
 - 4) A statement of the representative's decision with supporting rationale.
- C. The decision of the State Project Manager Office Director shall be final unless, within thirty (30) calendar days from the date of the receipt of the State Project Manager Office Director's decision, the Contractor files with the State a notice of appeal addressed to:

CalHHS Office of Technology and Solutions Integration
Attn: Director
2870 Gateway Oaks Dr., Ste. 150
Sacramento, CA 95833

The decision of the Director or its designee shall be final.

8. ENTIRE AGREEMENT

This Agreement (including the Exhibits and documents incorporated into this Agreement by reference) is the complete and exclusive statement of the Agreement between the Parties relating to the subject matter of this Agreement and supersedes all prior contracts or prior representations, oral or written, between the Parties relating to the subject matter of this Agreement.

9. INCOMPATIBLE ACTIVITIES & STATEMENT OF ECONOMIC INTEREST FORM 700

- A. The County Employee is subject to the following incompatible activities provision of Government Code section 1126 during the term of this Agreement:
 - “(a) Except as provided in Section 1128 and 1129, a local agency officer or employee shall not engage in any employment activity or enterprise for

compensation which is inconsistent, incompatible, in conflict with, or inimical to his or her duties as a local agency officer or employee or with the duties, functions, or responsibilities of his or her appointing power or the agency to which he or she is employed. The officer or employee shall not perform any work, service or counsel for compensation outside his or her local agency employment where any part of his or her efforts will be subject to approval by any other officer, employee, board or commission of his or her employing body, unless otherwise approved in the manner prescribed by subdivision (b)."

- B. Any employment or other arrangement for compensated services by the County Employee with an CalHHS OTSI contractor during the County Employee's assignment to the State, shall be deemed an incompatible activity within the meaning of Government Code section 1126, subdivision (a), and is prohibited during the term of this Agreement.
- C. The County Employee shall not engage in employment or services described in the preceding paragraph while performing work under this Agreement.
- D. All Contractor staff who will provide services pursuant to this Agreement shall complete an Assuming Office Statement of Economic Interests, Form 700 within thirty (30) calendar days of commencing any work for the CalHHS OTSI. All Contractor staff shall thereafter file a Form 700 on an annual basis and shall also file a Leaving Office Form 700 within thirty (30) calendar days of ceasing to perform any work for the CalHHS OTSI. In addition, upon beginning work for the CalHHS OTSI and every two (2) years thereafter, each Contractor staff shall complete the State's online Ethics Training Course, as maintained by the California Office of the Attorney General, and submit the certificate of completion to the CalHHS OTSI Filing Officer.

10. STATE POLICIES

Contractor staff resources shall review the Acceptable Use Security Policy, Equal Opportunity Employment Policy, Incompatible Activities Policy, Password Standard Policy, Peer-to-Peer File Sharing Policy, Reasonable Accommodation Policy and Request Process, Security Badge and Access Card Policy, Social Media Policy, Vendor Reference Policy, Wireless Security Policy, and Workplace Violence Prevention Policy and provide to the State Contract Manager a signed acknowledgment form agreeing to abide by the policies prior to performing any work under this Agreement. Copies of the current policies and forms are included herein as Exhibit G. Any updates to the policies and forms shall be provided to the Contractor by the State without the requirement of an Agreement amendment.

11. EQUIPMENT

- A. The State shall provide the following items for the Contractor staff's use while the Contractor staff performs work under this Agreement at the State facility:
 - 1) State-issued computer (laptop or desktop);
 - 2) Office space, including a desk, chair, desk phone, and Internet connection; and

3) Access to the office building and office suite.

- B. If the Contractor staff is approved to perform work under this Agreement remotely, then the State shall provide a State-issued computer (laptop or desktop) for the Contractor staff's performance of that remote work.
- C. Any State-provided equipment must be returned to the State upon termination of this Agreement.

12. RIGHTS TO COMPETE IN EXAMS

The County Employee maintains all rights to compete in the county's open and promotional exams and State open exams.

13. COUNTY EMPLOYEE LEAVE REPORTING

The County Employee shall report leave usage to their county while working for the State.

14. WORK RULES

The County Employee shall abide by the State's work rules, policies, and/or practices. Where conflicts may occur with the county's work rules, policies and/or practices, the State rules shall apply.

15. RIGHTS TO RETURN TO PREVIOUS PERMANENT POSITION

Upon termination or expiration of this Agreement, the County Employee shall return to his/her permanent position in the county department in which the County Employee worked prior to this Agreement, at the step at which the County Employee would have been eligible.

16. RETENTION OF PERMANENT COUNTY POSITION & SERVICE CREDIT

The County Employee shall retain their permanent position with the county during the term of this Agreement. The period during which the County Employee renders services pursuant to this Agreement shall be credited by the Contractor to the County Employee for purposes of determining seniority, promotional status, retirement date, and other employee benefits.

17. ELECTRONIC SIGNATURES

This Agreement may be executed in any number of counterparts, each of which will be an original, but all of which together will constitute one instrument. Each party of this Agreement agrees to the use of electronic signatures, such as digital signatures that meet the requirements of the California Uniform Electronic Transactions Act ("CUETA") Cal. Civ. Code §§ 1633.1 to 1633.17), for executing this Agreement. The parties further agree that the electronic signatures of the parties included in this Agreement are intended to authenticate this writing and to have the same force and effect as manual signatures. Electronic signature means an electronic sound, symbol, or process attached to or logically associated with an electronic record and executed or adopted by a person with the intent to sign the electronic record pursuant to the CUETA as amended

from time to time. The CUETA authorizes use of an electronic signature for transactions and contracts among parties in California, including a government agency. Digital signature means an electronic identifier, created by computer, intended by the party using it to have the same force and effect as the use of a manual signature, and shall be reasonably relied upon by the parties. For purposes of this section, a digital signature is a type of "electronic signature" as defined in subdivision (h) of Section 1633.2 of the Civil Code.

EXHIBIT E
SPECIAL PROVISIONS

1. CONFIDENTIALITY

Contractor and Contractor staff performing services pursuant to this Agreement agree to comply with State's Confidentiality and Security Requirements (Exhibit E – Attachment 1).

**EXHIBIT E – ATTACHMENT 1
STATE'S CONFIDENTIALITY AND SECURITY REQUIREMENTS**

1. CONFIDENTIALITY OF DATA

- A. Definitions – Confidential and Sensitive Information are defined as follows:
- 1) Confidential Information is information which identifies an individual (i.e., name, social security number, home/mailling address, telephone number, etc.) and/or entity (i.e., employing unit, etc.) and/or information in the possession of the State in which the disclosure is limited by contractual agreement (i.e., proprietary information, etc.).
 - 2) Sensitive Information is information maintained by the State, which is not confidential by definition, but requires special precautions to protect it from unauthorized access (i.e., financial or operational information). Sensitive Information is information in which the disclosure would jeopardize the integrity of the State (i.e., State's fiscal resources and operations).
- B. All financial, statistical, personal, technical, and other information relating to State operations that are designated Confidential or Sensitive Information by the State and that may become available to the Contractor as a result of the implementation of this Agreement ("State Data") shall be protected by the Contractor from unauthorized access, use, and disclosure through the observance of the same or more effective procedural requirements as are applicable to the State. The Contractor certifies that it will hold in the strictest confidence and will not copy, disclose or give access to State Data to any person or entity. The identification of all such confidential data and information as well as the State's procedural requirements for protection of such data and information from unauthorized use and disclosure shall be provided by the State in writing to the Contractor. If the methods and procedures employed by the Contractor for the protection of the Contractor's data and information are deemed by the State to be adequate for the protection of the State's confidential information, such methods and procedures may be used with the written consent of the State to carry out the intent of this paragraph. The Contractor shall not be required under the provisions of this paragraph to keep confidential any data or information that is or becomes publicly available, is already rightfully in the Contractor's possession, is independently developed by the Contractor outside the scope of this Agreement, or is rightfully obtained from third parties. Contractor understands that this obligation to maintain confidentiality and restrictions on the access, use, and disclosure of State Data shall remain in perpetuity.
- C. Contractor is notified that there are civil and criminal actions that may be invoked for unauthorized disclosure of information from confidential records. (Penal Code sections 11140-11144 and 13301-13304, and Civil Code section 1798 et seq., and Welfare and Institutions Code section 10850 et seq., provide for civil and criminal actions for unauthorized disclosure of information from confidential records.)
- D. The Contractor shall:

- 1) Instruct all subject matter consultants with access to Confidential and Sensitive Information regarding: (1) the confidential nature of the information, and (2) the sanctions against unauthorized access, use, or disclosure found in Civil Code section 1798.55 and Penal Code section 502.
- 2) Ensure that their subject matter consultants will not intentionally seek out, read, use, or disclose Confidential or Sensitive Information.
- 3) Not disclose any personally identifiable information to any person.
- 4) Require that all Contractor's subject matter consultants with access to Confidential Information sign the State Confidentiality Agreement in Exhibit E – Attachment 1, Section 2.
- 5) Cooperate in any investigations of information security incidents.
- 6) Immediately notify the State within twenty-four (24) hours of initial detection of any unauthorized access, use, and disclosure of State information. Notification shall be reported by telephone or email to:

CalHHS OTSI State Contract Manager	CalHHS OTSI Privacy Officer	CalHHS OTSI Information Security Officer
See the Agreement for State Contract Manager information	CalHHS OTSI Privacy Officer 2870 Gateway Oaks Dr., Ste 150 Sacramento, CA 95833 Email: privacy@osi.ca.gov Telephone: (916) 263-0330	CalHHS OTSI Information Security Officer 2870 Gateway Oaks Dr., Ste 150 Sacramento, CA 95833 Email: cwdsinfosecurity@osi.ca.gov and osiinfosecurity@osi.ca.gov Telephone: (916) 263-0481

CalHHS Office of Technology and Solutions Integration
County Subject Matter Expert

San Bernardino County
Agreement 75350059
Exhibit E – Attachment 1, State's
Confidentiality and Security Requirements

2. CONFIDENTIALITY AGREEMENT

Public assistance records and documents are subject to strict confidentiality requirements imposed by State and federal law including California Welfare and Institutions Code sections 10850, California Penal Code section 11167.5, and 45 Code of Federal Regulations.


I understand that I may have access to confidential, sensitive, and/or personal information. I agree to use reasonable precautions to assure that this information is not disclosed to unauthorized persons or used in an unauthorized manner.

I understand that non-compliance with the State's Confidentiality and Security Requirements may result in immediate termination of services or contractual arrangements in accordance with state and federal statutes. Criminal or civil action may be initiated by the appropriate authorities in certain instances. Obtaining any record containing personal information from a state agency under false pretenses is actionable under Cal. Civil Code 1798.56.

I understand that all network activity, including Internet and email usage, conducted with State resources is the property of the State of California. Further, I understand the State reserves the right to monitor and record all network activity including Internet and email usage, with or without notice, and therefore I should have no expectation of privacy in the use of these resources.

I understand that any tampering, interference, damage, or unauthorized access to computer data or computer systems may constitute a criminal violation of Penal Code Section 502.

I hereby certify that I am aware of the provisions and consequences for violating the State's Confidentiality and Security Requirements.

Contractor: San Bernardino County Consultant	
Individual: Bernard Mathis	
Individual's Signature: Signed by: 	
Title: County Consultant	Date: 2/4/2025
Phone: 909-269-1019	E-Mail Address: Bernard.Mathis@otsi.ca.gov

**EXHIBIT F
CONTRACTOR RESUME**

Bernard Mathis

OBJECTIVE:

To maintain County Consultant position to complete CARES to replace the current CWS/CMS System to serve Children and Families throughout the State of California.

Professional Accomplishments:

- ◆ Thirty-two (34) years post-graduates in a Social Services Experience
- ◆ CARES-Live Service Manager
- ◆ Service Desk
- ◆ Three years experience as a Child Protective Services Supervisor for State of Arizona
- ◆ Interviewing/Investigations skills, well-developed written and verbal communication skills, detail oriented, ability to work independently and as a cooperative team member, leadership, and supervisory skills
- ◆ Excellent assessment skills
- ◆ Service Desk Triage experience
- ◆ Collaboration/coordination skills
- ◆ Conducting CARES-Live Demos across the State to assist County CARES Users

EDUCATION:

1/2009

Graduate of University of Phoenix, San Bernardino, California
Master's degree Criminal Justice Administration

8/1987

Graduate of Arizona State University, Tempe, Arizona
Bachelor of Social Work

EMPLOYMENT HISTORY:

10/2015 – Present

County of San Bernardino, Children and Family Services/ State of California

Duties: As County Consultant on the Child Welfare Digital Services (CWDS) which is headquartered in Sacramento, CA. I'm responsible to partner with all 58 counties, state, and local government agencies to develop improvements to the existing Child Welfare Services/Case Management System (CWS/CMS) that supports its customers through technology services to assure the safety, permanency, and well-being of children at risk of abuse, neglect, or exploitation. These new services child welfare case intake, licensing, and case management services will be developed, implemented, and released incrementally over the next few years to fully replace the existing system. Assist CARES Service Desk to Triage Incident Tickets from County CARES Users. County Consultant SME for RFA Testing.

CARES-Live Service Manger for current Tools i.e., Snapshot, Facility Search, and CANS.
Provide CARES-Live Demos for County and State Users.

4/1997 -10/2015

County of San Bernardino, Children and Family Services

Duties: Licensing Investigator; responsible to investigate complaints on Foster Family Homes licensed by the county of San Bernardino. Conduct Background checks on in-coming Foster/ Foster Adoptive Parents. Prepare Statement of Facts reports to forward to State Licensing Attorney addressing licensing related issues for possible Administrative Action against licensee or applicant. Assist in developing a network of families for foster care that is more neighborhood-based, culturally sensitive and located primarily in the communities in which the children live. Assess emergency response referrals that include on-call duty. Collaborate with Foster Family Agency, State Licensing Daycare Investigators, Probation, School Officials, and Regional Offices to meet the needs of the clients served in the community. Trained potential foster parents regarding child development and meeting the daily needs of children placed in care.

Duties: Social Service Practitioner Carrier Worker; Assess families' needs evaluate and determine the necessity of DCS intervention. Initiate Family Reunification Services, Family Maintenance Services and Voluntary Services for clients. Assist in selecting adoptive families for Safe Arms Babies. Participate in mediation proceedings, file petitions with the court, place children in foster care, work closely with schools, hospitals, courts and assessment center. Train/mentor BSW interns. Work as lead social worker assigning and closing referrals. Serve on various committees: Family to Family, Team Decision Meeting, and Building Community Partners. Submit timely reports to the Court and enter information into County agency computer system known as CMS. Provide acting supervisor duties in the absence of my Supervising Social Service Practitioner.

08/2002-10/2015

Facilitator, San Bernardino Valley Community College District.

Duties including: Provide group training for Foster/Kinship care provider's license or certified on subjects matters from anger/communication, conversing with foster children in general, trauma, grief, loss and attachment, parenting foster children, boundary setting, child development, adopting older children, State Laws & Regulations and Changes in State Licensing Title 22 Regulations.

1993-1996

State of Arizona, Phoenix, Arizona: Child Protective Services Unit Supervisor. My duties as Unit Supervisor was to provide leadership, motivation, and training employees, provide direction to unit to improve workflow and services to the families in the community. Supervised a staff of 8 Child Protective Services Intake and Ongoing Workers responsible for diagnostic assessment and develop and implement complex treatment plans. Managed/responded to issues of conflict among staff members and facilitated conflict resolution among clients. Participated on the Statewide Re-Design committee to explore how Child Protective Services could become uniform Statewide. I Co-Chaired the Legal Re-Design Committee to change the legal definition of Dependency in the State of Arizona.

1990-1993

State of Arizona, Employed as a Child Protective Services worker. Investigated referrals of sexual/emotional/physical abuse of children in their families, as well as foster children in Arizona licensed Foster Homes and Group Homes. Scheduled monthly visits, wrote court reports, assessed children's needs, and completed home study assessments to return children back to their families. Made recommendations to the Maricopa County Juvenile Courts and state Attorney General on various cases to make children Wards of the State and remove from respective placements.

Additional Work History can be provided upon request.

Skills and Qualifications

- Subject Matter Expert on County Licensing Policy and Procedures
- CARES-Live Service Manager
- Ability to prepare written reports for a Statement of Facts for cases that require Administrative Action. Testify during Administrative Hearing and other assigned hearings for Community Care Licensing.
- Ability to perform and cover supervisor duties during direct supervisor's absence.
- Ability to make sound assessments on foster parent applicants criminal record background and assess their capacity to provide care to foster children. Decide if the applicants or adult family members need further mental health evaluation.
- Co-Chair Supporting Fatherhood Involvement Committee
- 2013 Completed Management & Leadership Academy Supervisory Development Program.

CalHHS Office of Technology and Solutions Integration
County Subject Matter Expert

San Bernardino County
Agreement 75350059
Exhibit G – State Policies

EXHIBIT G STATE POLICIES

The OTSI has promulgated several policies concerning the conduct of OTSI contractors in the OTSI workplace, which includes the following:

- Acceptable Use Security Policy
- Equal Opportunity Employment Policy
- Incompatible Activities Policy
- Password Standard Policy
- Reasonable Accommodation Policy and Request Process
- Peer-to-Peer File Sharing Policy
- Social Media Policy
- Vendor Reference Policy
- Wireless Security Policy
- Workplace Violence Prevention Policy
- Security Badge and Access Card Policy

Copies of these policies are included below:



Exhibit G - State
Policies.pdf

My signature below indicates that:

1. I have read and agree to abide by the OTSI policies referenced herein;
2. I agree to follow any instructions by the OTSI concerning applicable OTSI policies;
3. I understand that if I have any questions about any of the applicable OTSI policies, that I am to direct those questions to the State Contract Manager; and
4. I certify that I have no personal or financial interest and no present or past employment or activity which would be incompatible with my participation under the project(s) referenced below. I certify that neither my spouse nor my dependent children have a personal or financial interest and no present employment that would be incompatible with my participation in project activities.

Printed Name:	Bernard Mathis
Signature:	<div style="border: 1px solid black; padding: 5px;"> <p>Signed by:</p> <p><i>Bernard Mathis</i></p> <p>37E0934FB183449...</p> </div>
Date:	2/4/2025
Project(s):	CWS-CARES