

## Notice of Intent to Certify Sole Source

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**To:** Interested Parties

**From:** Craig P. Orgeron, CPM, Ph.D. <sup>CPO</sup>

**CC:** ITS Project Number 48276

**Date:** August 13, 2024

**Re:** Sole Source Certification Number 4636 to provide Semi-Autonomous Research Assistant (SARA) Subscriptions for the Mississippi Department of Rehabilitation Services (MDRS)

**Contact Name:** Atrael Porter

**Contact Phone Number:** 601-432-8077

**Contact E-mail Address:** [Atrael.Porter@its.ms.gov](mailto:Atrael.Porter@its.ms.gov)

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### Sole Source Certification Award Details

Regarding Information Technology Services (ITS) Sole Source Certification Number 4636 for the Mississippi Department of Rehabilitation Services (MDRS), please be advised that ITS intends to award SaraWorks, LLC (formerly known as The Career Index Corporation) as the sole source provider of Semi-Autonomous Research Assistant (SARA) Subscriptions through August 31, 2025, in an amount not to exceed \$225,288.00. If MDRS opts to renew SARA Subscriptions, this sole source certification shall be valid through August 31, 2027. Please be advised that ITS will determine if additional subscriptions are within scope during the certification period and may increase the spending authority accordingly. Should SaraWorks, LLC change their name during this certification period, then ITS will determine if a recertification is necessary. For an explanation regarding Mississippi state law, policy and procedures for sole source procurements, refer to Attachment B: Sole Source Procurement Overview.

### Sole Source Criteria

1. The product or services being purchased must perform a function for which no other product or source of services exist:

**The Semi-Autonomous Research Assistant (SARA) is a proprietary, AI-based virtual assistant software subscription only available from SaraWorks, LLC. The Virtual Assistant was developed specifically for the human services field and based on active digital assistant technology that closely mimic what a human assistant can do, compared to most "virtual assistants" which use passive digital assistant technology, meaning they await input before responding – typically with information or simple actions. This active digital assistant technology includes knowing which client to connect with when, what information to gather from the client according to agency policy, executing the decisions and documenting the interaction in concise and consistent case notes that SARA can then upload to the**

**target case management system. In addition, SARA can direct-connect with any case management system making it a seamless extension.**

2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services:

**MDRS is a state Vocational Rehabilitation (VR) agency that is tasked with bridging their case management system for the Workforce Innovation and Opportunity Act (WIOA) and is using the SARA subscription to accomplish this goal by minimizing data entry and documentation by MDRS staff. SARA improves communication and increases engagement with clients. Currently, SARA is communicating with almost 8,700 active MDRS clients and, in the past year, 102,762 communications were logged into SARA. SARA helps generate case notes, helps counselors process attachments, generates alerts for client communications and updates in client progress and case status, and allows staff to access reports to monitor staff and client performance.**

3. The product or services must be available only from the manufacturer and not through resellers who could submit competitive pricing for the product or services:

**SARA is a proprietary software that is only available from SaraWorks, LLC and serviced by their organization. The Vocational Rehabilitation Technical Assistance Center for Quality Management (VRTAC-QM), which MDRS partners with as a member of the Vocational Rehabilitation (VR) agencies, has deemed that SARA is the only system piloted and implemented with State Vocational Rehabilitation Agencies to bridge case management systems (with enhanced 2-way communication with participants) for State Vocational Rehabilitation Agencies (SVRAs). The Vendor's sole source certification letter is included as Attachment A.**

**Schedule**

<b>Task</b>	<b>Date</b>
First Advertisement Date	08/13/2024
Second Advertisement Date	08/20/2024
Response Deadline From Objectors	08/27/2027 at 3:00 P.M. Central Time
Notice of Award/No Award Posted	Not before 08/28/2024

**Project Details**

On September 1, 2018, the Mississippi Department of Rehabilitation Services entered into a Master Software as a Service Agreement with The Career Index Corporation for the use of SARA for one year, with opportunities to extend in one-year increments upon mutual consent for up to three years in total. This procurement was done outside of ITS purview.

In November 2019, ITS issued Sole Source Certification Number 4256 to provide a SARA Subscription for MDRS and received no objections. A Software as a Service Agreement was executed with The Career Index Corporation on March 2, 2020. In August 2021, ITS issued Sole Source Certification Number 4413 to provide a SARA Subscription for MDRS and, again, received no objections. The SaaS Agreement with The Career Index Corporation with was extended through August 30, 2024.

The VRTAC-QM, which MDRS partners with as a member of the Vocational Rehabilitation (VR) agencies, has deemed that SARA is the only system that is being used and can be piloted by VR agencies. The total spend to date is \$733,825.00.

**Submission Instructions and Format of Response from Objecting Parties**

Interested parties who have reason to believe that the Semi-Autonomous Research Assistant Subscriptions should not be certified as a sole source should provide information in the following format for the state to use in determining whether or not to proceed with awarding the Sole Source contract to SaraWorks LLC.

- 1.1 Interested Party Information
  - 1.1.1 Contact Name, Phone Number and email address
  - 1.1.2 Company Website URL, if applicable
- 1.2 Objection to Sole Source Certification
  - 1.2.1 Interested parties must present specific objections to the Sole Source certification using the criteria listed above.
  - 1.2.2 A statement regarding the Interested Party's capabilities as related to this Sole Source Certification Request.
- 1.3 Comments will be accepted at any time prior to Tuesday, August 27, 2024, at 3:00 p.m. (Central Time) to Atrael Porter at [Atrael.Porter@its.ms.gov](mailto:Atrael.Porter@its.ms.gov) or at the Mississippi Department of Information Technology Services, 3771 Eastwood Drive, Jackson, Mississippi 39211. Responses may be delivered by hand, via regular mail, overnight delivery, e-mail or by fax. Fax number is (601) 713-6380. **ITS WILL NOT BE RESPONSIBLE FOR DELAYS IN THE DELIVERY OF RESPONSES.** It is solely the responsibility of the Interested Parties that responses reach ITS on time. Interested Parties may contact Atrael Porter to verify the receipt of their Responses. Responses received after the deadline will be rejected.
- 1.4 Interested Party responses should include the following information:

**SUBMITTED IN RESPONSE TO  
Sole Source Certification No. 4636-48276  
Accepted until August 27, 2024 @ 3:00 p.m.,  
ATTENTION: Atrael Porter**

If you have any questions concerning the information above or if we can be of further assistance, please contact Atrael Porter at 601-432-8077 or via email at [Atrael.Porter@its.ms.gov](mailto:Atrael.Porter@its.ms.gov).

- Attachment A: Vendor Correspondence
- Attachment B: Sole Source Procurement Overview



## Memo

**Subject:** Sara Sole Source Justification

**Date:** March 4, 2024

**To:** Mississippi Department of Rehabilitation Services, 1281 Hwy. 51, Madison, MS, 39215

**From:** Cody Dixon, VP - Growth & Operations, SaraWorks

**Memo:**

We are writing this memo as a justification of sole source procurement for the product "Sara" in the state of Kentucky. Our product is a proprietary software that is only available from our company and serviced by our organization.

The following are the unique characteristics of the Sara communications platform:

- **Vocational Rehab History-** Virtual assistant developed specifically for the human services field, with an eight year history servicing Vocational Rehabilitation agencies.
- **Active Digital Assistant Technology-** Most "virtual assistants" and "chatbots" use passive digital assistant technology that awaits input before responding. Sara uses Active Digital Assistant technology that proactively connects with clients, more closely mimicking what a human assistant can do.
- **Two Way Communication-** Sara provides two-way communication in English and Spanish, to interpret responses and determine action based on the agency's policy.
- **Case Note Integration with System of Record-** Sara supports compliance by documenting the interaction in concise and consistent case notes that integrate into the agency's case management system.
- **Virtual Appointments-** Sara has an embedded virtual appointment tool, enabling an agency to offer HIPAA-compliant remote video conferencing.
- **Electronic Signatures-** Sara offers a native electronic signature tool and document management center.

Sara has been recognized as "unique" in the following projects:

- In 2015, Sara was selected to join the RSA funded, Workforce Innovation Technical Assistance Center project. The project showcased Sara's ability to collect common core WIOA required data and distribute the information to agencies sharing co-enrolled clients. Details [here](#).
- On May 1, 2019, The Veterans Administration (VR&E) acquired Sara for national implementation on a sole source basis. Details [here](#).
- In 2020, Sara was added to the RSA funded Vocational Rehabilitation Technical Assistance Center for Quality Management (VRTAC-QM). Through the project, Sara continues to enable State VR agencies to improve effective service delivery, and increase the number and quality of employment outcomes for individuals with disabilities. Details [here](#).

Signed:

A handwritten signature in black ink that reads "Cody Dixon".

Cody Dixon, VP - Growth & Operations, SaraWorks



6367 Alvarado Court, Suite 350  
San Diego, CA 92120  
619-594-7935 (Voice)  
619-594-4208 (Fax)

**Pamela Brown, Information Technology Director**  
Mississippi Department of Rehabilitation Services

**April 10, 2024**

**Dear Ms. Brown:**

The Vocational Rehabilitation Technical Assistance Center for Quality Management (VRTAC-QM) works together with State Vocational Rehabilitation Agencies (SVRAs) to identify and implement quality program and performance, and fiscal and resource management strategies and practices that will improve service delivery to, and employment outcomes achieved by, individuals with disabilities. As part of our project, we have piloted and implemented the artificial intelligence program SARA.

SARA acts as a rehabilitation assistant and uses secure two-way communication with VR consumers to gather and report information that can be populated to AWARE seamlessly. Currently, SARA is the only system that RSA and the VRTAC-QM have piloted and implemented with State Vocational Rehabilitation Agencies to bridge case management systems (with enhanced 2-way communication with participants) for SVRAs. SARA is not available from any other vendor and is the only program with a proven record of success in the field of vocational rehabilitation.

Please feel free to contact me at [ccompton@sdsu.edu](mailto:ccompton@sdsu.edu) if you need any further information.

**Sincerely,**

**Chaz Compton, Ed.D., CRC**  
Project Director, VRTAC-QM

The acquisition of information technology for all state agencies and institutions of higher learning (IHLs) is within the scope of the ITS law, found in Mississippi Code Section 25-53-1, et seq., and the policies and procedures established in accordance with this statute, found in the ITS Procurement Handbook posted on the ITS website ([www.its.ms.gov](http://www.its.ms.gov)).

ITS enabling legislation requires that information technology hardware, software and services be acquired in a manner that insures the maximum of competition among all manufacturers and suppliers of such equipment and services. Accordingly, ITS promotes full and open competition through the issuance of open specifications and the objective evaluation of Interested Party proposals to determine the lowest and best offering to meet an agency's or public university's business requirements. True competition protects the integrity and credibility of purchasing in the public sector and is essential in providing best value and adequate contractual protection for the purchasing entity. In certain limited situations, information technology acquisitions may be sole-sourced.

ITS utilizes the provisions of Public Purchasing Law for Sole Source and Emergency procurements of information technology. Mississippi Public Purchasing Law (Mississippi Code Section 31-7-13) specifies that noncompetitive items available from one source only be exempted from bid requirements (sole-sourced). ITS statute, in Section 25-53-5 (p), permits ITS to utilize provisions in Public Purchasing Law or regulations, when applicable.

Per Public Purchasing law, acquisitions must meet the following criteria to be authorized as sole source:

1. The product or services being purchased must perform a function for which no other product or source of services exists,
2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services, AND
3. The product or services must be available only from the manufacturer and NOT through resellers who could submit competitive pricing for the product or services. The vendor's correspondence regarding this criterion for this project is included as Attachment A.

By policy as documented in the ITS Procurement Handbook, acquisitions of IT services must include the following information to be authorized as sole source:

1. An explanation about why the amount to be expended is reasonable, and
2. An explanation regarding the efforts by the purchaser to obtain the best possible price.

For state agencies, approval of all technology purchases with a lifecycle cost of \$5,000 or less, including sole source purchases, has been delegated to the agency. The ITS Procurement Limits Policies for Agencies (a section in the ITS Procurement Handbook) require a minimum of two competitive written bids or proposals for technology purchases with a lifecycle cost over \$5,000 but not over \$75,000 (not over \$25,000 for projects funded by the American Recovery and Reinvestment Act). Since, for single source items, the procuring agency will be unable to obtain two written bids, ITS must certify all sole source acquisitions of information technology with a lifecycle cost greater than \$5,000.

Institutions of Higher Learning (IHLs) or public universities have been delegated the authority to certify sole source procurements up to \$250,000 lifecycle cost under the ITS Procurement Limits Policies for IHLs (a section in the ITS Procurement Handbook). For the certification of sole source procurements delegated to the CIOs at public universities, the public university must follow ITS' Sole Source Procedure, including advertisement of the intent to award as sole source. Institutions certifying a sole source purchase must ensure the criteria listed above are met and documented in writing by the institution and the Interested Party prior to certifying a product or service as sole source. Sole source documentation must be reviewed and approved by the IHL's CIO for any sole-source certification above \$5,000. All sole source documentation should be retained in the public university's procurement file. Sole source requests above \$250,000 lifecycle cost require ITS approval.

Other than the delegations outlined above, all sole source technology procurements must be certified by ITS.

ITS thoroughly reviews Sole Source Certification Requests, determining if competing products and/or services exist. If so, ITS conducts a competitive procurement. If ITS' review confirms the sole source, then a Sole Source advertisement is issued, giving other Interested Parties an opportunity to identify competing products and/or services. Based upon the results of the Sole Source advertisement, ITS will either certify the request as a sole source or conduct a competitive procurement.