

County of Santa Clara
Office of the County Executive



County Government Center, East Wing
Eleventh Floor – East Wing
70 West Hedding Street
San Jose, California 95110

DATE: July 5, 2022

TO: Honorable Members of the Board of Supervisors

FROM: Jeffrey V. Smith, M.D., J.D., County Executive

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JVS

SUBJECT: McCorquodale Grant and Historical Book Writing Contract

At its June 7, 2022 meeting (Item No. 22), at the request of Supervisor Lee, the Board of Supervisors directed Administration to provide an off-agenda report relating to an agreement between the County and the McCorquodale Corporation for grant writing and historical book writing services. Specifically, Supervisor Lee requested information regarding the amount of revenue the County has received related to the McCorquodale Corporation's grant writing efforts, the amount of funds allocated in the most recent agreement to grant writing versus historical book writing, and justification for procuring these services through a single source agreement and any lessons learned. This report responds to these requests.

Revenue Generated for the County Through Grant Research and Writing

Grant funding is an important source of revenue, often allowing the County to launch and augment programs, develop and evaluate new models of service delivery, and strengthen community services. Grants and other awards from outside sources also provide opportunities for County agencies and departments to maintain and enhance operations.

For well over two decades, Jean McCorquodale (aka the McCorquodale Corporation) provided professional writing and grant services for various departments in the County of Santa Clara. In that time period, more than \$320 million in revenue was received by the County through proposals written by Ms. McCorquodale. This includes more than \$100 million awarded as a result of highly competitive grant selection processes and more than \$200 million based on non-competitive but mandatory proposals that were required to meet stringent and often complex standards.

The broad spectrum of health and human service needs for which Ms. McCorquodale helped secure funding include substance use disorder prevention and treatment, crisis stabilization and crisis residential facility acquisition, smoking prevention and cessation services, Hepatitis C prevention and control, chronic disease prevention, health eating and active living programs, lead poisoning prevention, Medi-Cal outreach, elder abuse prevention, job training, school-based behavioral health services, crime reduction programs, trauma informed services for youth in the juvenile justice system, children's health insurance, fetal infant mortality review, Drug Treatment and Mental Health Treatment Court services, sickle cell counseling, child welfare differential response planning, family reunification programs, violence prevention, teen pregnancy prevention,

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and numerous other services and programs. Through these extensive efforts, Ms. McCorquodale developed a deep and unique knowledge of County government, programs, and services.

Payments for Grant Writing Versus History Book Writing

Over the years, through various contracts, Ms. McCorquodale delivered grant research and writing services as well as other professional writing services to assist County agencies and departments with complex reports and other technical writings.

Ms. McCorquodale's most recent contract ran from July 1, 2014 through July 10, 2020. It was originally approved by the Board of Supervisors on June 24, 2014 for countywide grant research and writing services and was amended several times through one-year extensions. All told, the maximum financial obligation approved under this agreement totaled \$1,808,250. In June of 2018, the scope of the agreement was expanded to include writing services necessary to complete a professionally written historical account (the History Project) demonstrating the role of County government in shaping the history of Santa Clara Valley since formation of the County.

Based on a review of the original 2014 contract and all amendments, invoices and payments, the History Project portion of the McCorquodale agreement accounted for a total of at least \$1,044,400 in contract payments, while other professional research and grant writing services accounted for \$735,987.50. A small amount of this latter category of payments appear to also be related to early research associated with the History Project.

Following receipt of Ms. McCorquodale's draft manuscript, it was brought to the County's attention that portions of the draft appear to be lifted from outside sources without attribution. Further investigation is underway to evaluate these claims and any potential remedies available to the County.

Single Source Justification

Ms. McCorquodale was designated as a single source vendor by the Board of Supervisors in 2009 and then again in 2014 based on her grant writing experience with the County and her unique knowledge and familiarity with the programmatic subject matter, mission, and services of various County departments as well as the need for continuity with some ongoing grant projects.

In 2018, a recommendation was made to amend Ms. McCorquodale's grant writing contract to include research and writing services to develop a comprehensive written historical record documenting County government's role in local history. The rationale for procuring these services through an amendment to Ms. McCorquodale's existing agreement, rather than putting this work out to bid, was based on the vendor's long, well regarded experience writing about the County and her depth of knowledge of County services, philosophy, and historical trends.

In hindsight, these historical book writing services should have been put out to bid, as the experience and skills needed to be a highly effective grant and technical writer for and about County government do not necessarily translate to the production of a comprehensive historical book.

cc: Miguel Márquez, Chief Operating Officer
James R. Williams, County Counsel
Tiffany Lennear, Clerk of the Board
Chief Board Aides