ONE CITY. ONE JACKSONVILLE.

City of Jacksonville, Florida

Lenny Curry, Mayor

Procurement Division
Ed Ball Building
214 N. Hogan Street, Suite 800
Jacksonville, Florida 32202

MEMORANDUM

TO: **Competitive Sealed Proposal Evaluation Committee ("CSPEC")**

FROM: **Dustin Freeman, Chief of Procurement**

DATE: **March 20, 2023**

RE: **REQUEST FOR APPROVAL TO UTILIZE COMPETITIVE SEALED PROPOSAL PROCESS**

Pursuant to Chapter 126, Part 2, § 126.204, approval is requested to utilize the Competitive Sealed Proposal process to formally procure services for **STATE ATTORNEY'S OFFICE, FOURTH CIRCUIT, CASE MANAGEMENT SYSTEM.** As a follow-up to the same, the CSPEC is now requested to review and approve the solicitation documents attached hereto.

More specifically, the CSPEC is requested to review and approve the evaluation criteria as outlined in the attached Request for Proposal ("RFP"). Procurement's review in this matter has revealed that:

The attached Certification Letter and the Scope of Services received from the using agency appear to be in order.

The RFP **has been** reviewed and approved by Risk Management regarding insurance and indemnification requirements.

The RFP **has been** reviewed and approved by EBO regarding JSEB participation goals and EBO recommends: Encouragement Program

It is requested that the CSPEC take these issues into consideration in its review and/or approval in this matter.

CSPEC APPROVAL

Finance Director or designee	Procurement Director or designee
General Counsel or designee	Department/Agency Representative
Public Works Director or designee	

Department of Finance and Administration

Procurement Division

CITY OF JACKSONVILLE

January 30, 2023

To: Dustin L. Freeman, Division Chief
Procurement Division

From: Dinah Mason, EBO/JSEB Administrator DLM
Karem Baez, EBO/JSEB Business Compliance Officer
Jacksonville Small and Emerging Businesses

RE: **State Attorney's Office, Fourth Circuit, Case Management System**

The Jacksonville Small and Emerging Business & Contract Compliance (JSEB) Office has reviewed the scope of work, consulted the using agency, and contacted ready, willing, and available JSEBs.

Based upon our findings, we recommend the following:

- ☒ Encouragement
- ☐ Participation
- ☐ Set-A-Side

Our outreach efforts are documented and attached. Please let us know if you have any questions or concerns.

I can be reached at (904) 255-8167

Cc: Ruben Ola
Dinah Mason

311 West Monroe Street
Jacksonville, Florida 32202
www.sao4th.com

MELISSA W. NELSON
STATE ATTORNEY

Fourth Judicial Circuit
Clay • Duval • Nassau
(904) 255-2500

January 27, 2023

Dustin Freeman, Chief
Procurement Division
Ed Ball Building
214 North Hogan Street, Suite 800 (8th Floor)
Jacksonville, Florida 32202

RE: State Attorney's Office Case Management System

Dear Mr. Freeman:

Thank you for the support of the City of Jacksonville as we seek to extend a request for proposals (RFP) for a case management system. Since the notification of the budget award in the City of Jacksonville's most current budget ($600,000), I have been working with Ruben Ola toward completing the RFP. I believe our office has provided the required or desired essentials of a case management system in section 4.

By way of background, the State Attorney's Office (SAO) employs approximately 340 employees across three counties. The main office is in Duval County, with satellite offices in Nassau and Clay counties. Each year, the office processes between 60,000 and 70,000 case referrals. All aspects of our daily operations center on our case management system. The system is utilized by all personnel – from attorneys, investigators, paralegals, and victim advocates to clerical support. Without a case management system, our office would be unable to function.

The SAO last solicited a case management system more than twenty years ago. At that time, Computer Information and Planning (CIP) received the award. It implemented our current case management system, STAC. STAC is utilized by approximately ten prosecuting offices across the State of Florida.

When State Attorney Nelson took office in 2017, we began considering whether our current case management met our needs. We approached the City in 2017 and 2018 about a new case management system, only to realize the available 15U funding would prohibit such a move. During the COVID19 Pandemic, it became apparent to the office we needed to explore alternatives.

In 2021 and 2022, I met with contacted vendors across the country to review product demonstrations. Generally, the available systems are licensed vendors' products that can be configured to meet the needs of a prosecutor's office. There is typically an implementation phase lasting between six and twelve months. The vendor maps our workflows, customizes the product to our specific needs, and imports our current data. Presently, we store 4 million records.

The implementation phase is generally the costliest. Conservatively, the cost to implement is $300,000 on the low end to $600,000. Once implemented, there is often a yearly licensing and maintenance agreement that ranges from $150,000 to $300,000, depending on the vendor. We currently spend between $150,000 to $175,000 annually on STAC. Under the Florida Constitution, the City funds our necessary IT expenditures, which is a cost borne by the City.

I look forward to our next steps. Thank you again for your support in this crucial endeavor.

Sincerely,

Stephen Siegel
First Assistant State Attorney

Ola, Ruben

From:	Verdejo Magras, Wanda on behalf of RiskReview
Sent:	Wednesday, February 15, 2023 7:42 AM
To:	Ola, Ruben
Cc:	Siegel, Stephen; Campbell, Nike
Subject:	RE: Risk Management Review: RFP for STATE ATTORNEY'S OFFICE, FOURTH CIRCUIT, CASE MANAGEMENT SYSTEM
Attachments:	RISK REDLINED ESC-0309-23 STATE ATTORNEYS OFFICE FOURTH CIRCUIT CASE MANAGEMENT SYSTEM.docx

Greetings,

Thank you for allowing Risk Management an opportunity to review your request.

I consulted the details of the agreement and the following recommendations were made.

Summary: As requested, we reviewed the Insurance Requirements included as Exhibit G to the RFP. We made a few recommended changes in the document with our redline and comments:

- We recommend moving the Cyber and the Professional Liability requirements so they are next to each other because we expect some proposers will have combined programs.
- We increased the limits for both Cyber and Professional Liability from $1 M to $5 M. This was based upon review of the scope of services for the system.
- We deleted the requirement for Crime Insurance. Based upon our review of the scope of services for the system, it is our understanding the system will track some financial data (like restitution) but will not be involved in the payment process.

Unless there is any further question, Risk Management concludes the review.

NOTE: Please label all emails correspondence: Subject: Fourth Circuit Court-Case Management System (Circuit Court)

Any further questions, please feel free to contact me.

NOTE: All emails sent to Wverdejo@coj.net **&** RiskReview@coj.net

Any further questions, please feel free to contact me.

Cordially,

Wanda Verdejo
Property and Casualty Compliance Administrator
for Risk Management Division
City of Jacksonville
117 West Duval Street, Suite 335
Jacksonville, FL 32202-3381
Phone : 904-255-5314

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From: Ola, Ruben <RubenO@coj.net>
Sent: Friday, February 03, 2023 5:55 PM
To: RiskReview <RiskReview@coj.net>; Verdejo Magras, Wanda <WVerdejo@coj.net>
Cc: Siegel, Stephen <SSIEGEL@coj.net>; Campbell, Nike <nikecampbell@coj.net>
Subject: Risk Management Review: RFP for STATE ATTORNEY'S OFFICE, FOURTH CIRCUIT, CASE MANAGEMENT SYSTEM

Good Afternoon,

On behalf of FOURTH JUDICIAL CIRCUIT OF FLORIDA, attached is solicitation document request for Risk Management review and recommendation of insurance coverage for STATE ATTORNEY'S OFFICE, FOURTH CIRCUIT, CASE MANAGEMENT SYSTEM. Should there be question or need additional information, feel free to contact me at rubeno@coj.net.

Thank you,

Ruben Ola, Purchasing Analyst
City of Jacksonville
Procurement Division
Finance and Administration Department
214 N. Hogan Street, Suite 800
Jacksonville, FL 32202
Phone: 904.255.8823
Fax: 904.255.8837