City of Jacksonville, Florida

Lenny Curry, Mayor

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

ONE CITY. ONE JACKSONVILLE.

MEMORANDUM

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

FROM: **Gregory Pease, Chief of Procurement** GP

DATE: **October 1, 2021**

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 a supplier for **Personal Exemptions Audit Service for the Duval County Property Appraiser**. 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 the "Encouragement Plan".

The RFP has been reviewed and approved by ITD regarding technical and security requirements.

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 Chief or designee
_____	_____
General Counsel or designee	Department/Agency Representative
_____	
Public Works Director or designee	

OFFICE OF THE PROPERTY APPRAISER

JERRY HOLLAND
DUVAL COUNTY
PROPERTY APPRAISER

231 E. FORSYTH STREET
JACKSONVILLE, FL 32202
(904) 255-5900

TO: Gregory Pease, Chief of Procurement

FROM: Kathleen Collins, Chief Financial Officer PAO

SUBJECT: Request for RFP

DATE: September 14, 2021

Please take appropriate action to issue a Request for Proposal (RFP) for the referenced services.

The following information is furnished in accordance with chapter 126.204 of the City Ordinance Code.

The purpose of this request is to seek permission to utilize a Competitive Sealed Proposal Evaluation Committee (CSPEC) process for the procurement of a Personal Exemptions Audit Service for the Duval County Property Appraiser's Office. The evaluated bid process is required due to the complexity of the scope, the differences among the vendors' solution and the importance of the qualifications of the providers versus a low bidder, open market method. To ensure that our minimum requirements are met, the evaluated process would be the fairest way to select the vendor. There is no actual cost to the Property Appraiser's Office, the vendor will receive a percentage of recovered back taxes.

The estimated length of contract will be three (3) years and three (3) two-year renewal options.

The proposed project will not duplicate existing services. There are currently no bids or contracts out for these services.

The sub-committee responsible for evaluating the submitted proposals will be comprised of representatives from the Property Appraiser's Office.

The names of the representatives designated to serve on the committee are:
Kathleen Collins
Jerry Holland
Keith Hicks

It is our desire that this job be awarded in the form of a contract upon selection of the winning vendor.

Thank you for considering our request.

Department of Finance and Administration

Procurement Division

CITY OF JACKSONVILLE

September 14, 2021

To: Greg Pease, Division Chief
Procurement Division

From: Dinah Mason, EBO/JSEB Administrator
Sandy Simpson, EBO/JSEB Compliance Officer
Jacksonville Small and Emerging Businesses

RE: **Personal Exemptions Audit Service for The Duval County Property Appraiser**

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: Dave Klages
Dinah Mason

214 N. Hogan Street, Suite 800 | Jacksonville, FL 32202 | Phone: 904.255.8840 | Fax: 904.255.8842 | www.jseb.coj.net

Klages, David

From:	Verdejo Magras, Wanda on behalf of RiskReview
Sent:	Monday, September 20, 2021 9:25 AM
To:	Klages, David
Subject:	Concluded review RE: Review of Bid Document: Personal Exemptions Audit Service for the Duval County Property Appraiser
Attachments:	Request for Service - Review of Bid Docs.docx; RM REVIEWED AND REDLINED INS. REQ. Personal Exemptions Audit Service - Draft 01.docx; scope-Personal Exemptions Audit Service - Draft 01.pdf

Greetings,

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

Risk Management reviewed and **redlined** the Indemnification & Insurance Requirements for Personal Exemptions Audit Service for the Duval County Property Appraiser

Summary:

- **Form 3 Insurance Agent Acknowledgment**: I do not know who implemented "Insurance Agent Acknowledgment Form 3 " to be added in the bid, contracts, or agreements. My view on the matter is as follows...If you wish to omit the form, I am ok with it because it's the applicant's responsibility to ensure their insurance agent complies with all the contract's insurance requirements. Some insurance agents are refusing to sign the form and it's creating havoc with contract compliance.

- I added Professional Lia. because I assumed the applicant should have some **Certified Public Accountant** degree

NOTE: Please submit the Applicant's certificate of insurance with executed Agreement for Risk at RiskReview@coj.net to confirm if the certificate meets Agreement's insurance requirements. Lable email Subject line as Personal Exemptions Audit Service for the Duval County Property Appraiser

Risk Management concludes the review.

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
New Cell : 904-489-5495

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From: Klages, David <DKlages@coj.net>
Sent: Thursday, September 16, 2021 4:13 PM
To: RiskReview <RiskReview@coj.net>
Subject: FW: Review of Bid Document: Personal Exemptions Audit Service for the Duval County Property Appraiser

Hi Wanda. Please see below... I'm not rushing you on this, I just want to make sure you saw the request.

Thank you,

David R. Klages
Purchasing Analyst
City of Jacksonville, Procurement Division
214 N. Hogan Street, Suite 800
Jacksonville, FL 32202
Phone: (904) 255 – 8813
Email: dklages@coj.net

CITY OF JACKSONVILLE

From: Klages, David
Sent: Tuesday, September 14, 2021 11:34 AM
To: RiskReview <RiskReview@coj.net>
Cc: Collins, Kathleen <KathleenC@coj.net>
Subject: Review of Bid Document: Personal Exemptions Audit Service for the Duval County Property Appraiser

Hi Wanda. Would you please review the insurance and indemnification requirements for the attached solicitation? The scope of services is for auditing of fraudulent and improper personal exemption claims for the Duval County Property

Klages, David

From: Brown, Elizabeth
Sent: Tuesday, September 28, 2021 5:18 PM
To: Klages, David
Cc: Collins, Kathleen; Lathrop, Kenneth; Gupta, Mamta; Galley, Craig
Subject: RE: Review of Bid Document: Personal Exemptions Audit Service for the Duval County Property Appraiser

David,

Both Craig Galley, ITD's Information Security Officer, and I have reviewed the RFP and have no concerns after Risk Management's changes.

Once a solution is selected, we would like to have the opportunity to review the bid response and proposed contract to understand what type of homeowner data will be aggregated and any associated risks.

Thank you,

Elizabeth Brown
IT Operations Manager
Office: 904.255.8199
Cell: 904.652.9186

From: Lathrop, Kenneth <LATHROP@coj.net>
Sent: Monday, September 20, 2021 4:11 PM
To: Klages, David <DKlages@coj.net>; Gupta, Mamta <MGupta@coj.net>
Cc: Collins, Kathleen <KathleenC@coj.net>; Brown, Elizabeth <ElizabethB@coj.net>
Subject: RE: Review of Bid Document: Personal Exemptions Audit Service for the Duval County Property Appraiser

David,

I have copied Elizabeth to assist you. She will have her team review or ensure it gets to the correct personnel in ITD. Paul is out on bereavement until at least October 4 and Craig returns on September 27.

Thank you.

From: Klages, David <DKlages@coj.net>
Sent: Monday, September 20, 2021 3:54 PM
To: Lathrop, Kenneth <LATHROP@coj.net>; Gupta, Mamta <MGupta@coj.net>
Cc: Collins, Kathleen <KathleenC@coj.net>
Subject: FW: Review of Bid Document: Personal Exemptions Audit Service for the Duval County Property Appraiser
Importance: High

Good afternoon Kenneth/Mamta. Please see below and attached... I'm not sure who the right person is to review this but I'm trying to get someone from ITD to look at the attached draft RFP and let me know if it is okay issue. Would you please confirm that you have read this email and let me know who I should send it to if you are not the correct people? I started with Paul Freeman but his Out of Office replay is on and it doesn't say when he will be back.