SUBJECT: Project & Portfolio Management Solution (CSPEC)

BID #: ESC-0516-16 **OPEN DATE: 07/27/2016**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: One Time Purchase

AGENCY: Information Technologies Division

BASIS OF AWARD: To the Highest Scoring Bidder Based On The Evaluation Criteria

NUMBER OF BIDS INVITED: (12) NUMBER RECEIVED: (4) OTHER: (1)

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to increase the award to Change Point dba Daptiv Solutions, LLC., in the amount of $4,214.00 to cover travel expenses for workshops for the Information Technologies Division. The total revised expenditure not-to-exceed $113,954.00.

Funding to be encumbered from account AFIT531CSCS-06431 to be issued by purchase order.

ATTACHMENTS: Recommendation Memo; Vendor Invoices; Previous Awards

ANALYST: _____ CHELSEY FLEMING

RESPECTFULLY SUBMITTED _____ GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Kenneth Lathrop, Chief Information Officer, Information Technologies Division

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(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED _____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

Information Technologies Division

CITY OF JACKSONVILLE

October 5, 2017

TO: Greg Pease, Chief of Procurement
Procurement Division

FROM: Michael Turner, PMO Manager
Information Technologies Division

THRU: Kenneth Lathrop, Chief of Information Technologies / CIO
John Proctor, Finance Officer Information Technologies

SUBJECT: **ESC-0516-16 Project and Portfolio Management Solution - Amend Award**

The Information Technologies Division (ITD) requests approval to amend the award and contract for ESC-0516-16 Project and Portfolio Management Solution to Daptiv Solutions, LLC. An increase of $4,214 is requested to cover the vendor travel expenses needed to conduct the Solution Design and Change Acceleration workshops for the system for ITD.

Original Award Amount: $109,740
Award Increase: $4,214
Total Not-to-Exceed Amount: $113,954

Funding Source: AFIT531CSCS 06431

Your favorable consideration of this request is appreciated.

CC: Michele Harrell, Senior Project Manager
Tom Ossi, Technology Contract and Records Manager

daptiv

Invoice

Daptiv Solutions LLC
1111 Third Avenue, Suite 700
Seattle WA 98101
United States
Tax ID 27-2963916

Date 8/31/2017
Invoice # INV-07880
Customer
Due Date 9/30/2017
Tax ID

Bill To
***Michael Turner (CC: Invoices)
CITY OF JACKSONVILLE
117 W. Duvall Street
Suite 375
Jacksonville FL 32202

Ship to
Finance and Administration Informati...
CITY OF JACKSONVILLE
Ed Ball Building, 9th Floor
214 N. Hogan Street
Jacksonville FL 32202

Customer PO PO610883
Payment Terms Net 30
Exchange Rate 1.00
Currency USD

Project	Item	Qty	Rate	Amount	Tax Rate
	Katie Conor's Expences for May 2017 for the SO-6795	1	1,857.21	1,857.21	

Total 1,857.21
Amount Due $1,857.21

Other Comments
Katie Conor's Expences for May 2017 for the SO-6795; EST-8085 - Revised

Payment Instructions

Wells Fargo Bank N.A.
San Francisco, CA USA
ABA: 121000248
Swift Code: WFBIUS6S
Credit Acct. #: 4123716565
For Credit of: Daptiv Solutions LLC.

email remittance to: accounts.receivable@changepoint.com

If you have any questions about this invoice, please contact: billing@changepoint.com

Thank you for your business!

RECEIVED 9/7/17

daptiv

Invoice

Daptiv Solutions LLC
1111 Third Avenue, Suite 700
Seattle WA 98101
United States
Tax ID 27-2963916

Date	7/31/2017
Invoice #	INV-07731
Customer	
Due Date	8/30/2017
Tax ID	

Bill To
CITY OF JACKSONVILLE
117 W. Duvall Street
Suite 375
Jacksonville FL 32202

Ship to
Finance and Administration Informati...
CITY OF JACKSONVILLE
Ed Ball Building, 9th Floor
214 N. Hogan Street
Jacksonville FL 32202

Customer PO	PO610883	**Exchange Rate**	1.00
Payment Terms	Net 30	**Currency**	USD

Project	Item	Qty	Rate	Amount	Tax Rate
	Jay Sheldon's Billable Travel Expenses for May 2017	1	1,252.91	1,252.91	

Total	1,252.91
Amount Due	$1,252.91

Other Comments
Jay Sheldon Revised Expense Billing May 2017 (Details Attached) Project: 616 City of Jacksonville - SO-6795 BDI

Payment Instructions

Wells Fargo Bank N.A.
San Francisco, CA USA
ABA: 121000248
Swift Code: WFBIUS6S
Credit Acct. #: 4123716565
For Credit of: Daptiv Solutions LLC.

email remittance to: accounts.receivable@changepoint.com

RECEIVED 9/7/17

If you have any questions about this invoice, please contact: billing@changepoint.com

Thank you for your business!

daptiv

Invoice

Daptiv Solutions LLC
1111 Third Avenue, Suite 700
Seattle WA 98101
United States
Tax ID 27-2963916

Date 8/31/2017
Invoice # INV-07879
Customer
Due Date 9/30/2017
Tax ID

Bill To
***Michael Turner (CC: Invoices)
CITY OF JACKSONVILLE
117 W. Duvall Street
Suite 375
Jacksonville FL 32202

Ship to
Finance and Administration Informati...
CITY OF JACKSONVILLE
Ed Ball Building, 9th Floor
214 N. Hogan Street
Jacksonville FL 32202

Customer PO PO610883
Payment Terms Net 30
Exchange Rate 1.00
Currency USD

Project	Item	Qty	Rate	Amount	Tax Rate
	Gary McHenry's Billablle Expenses for June 2017 - SO-6795	1	1,103.88	1,103.88	

Total 1,103.88
Amount Due $1,103.88

Other Comments
SO-6795 - Gary McHenry's Billable Expenses for June 2017 - Revised

Payment Instructions

Wells Fargo Bank N.A.
San Francisco, CA USA
ABA: 121000248
Swift Code: WFBIUS6S
Credit Acct. #: 4123716565
For Credit of: Daptiv Solutions LLC.

email remittance to: accounts.receivable@changepoint.com

RECEIVED 9/7/7

If you have any questions about this invoice, please contact: billing@changepoint.com

Thank you for your business!

SECTION 4

GENERAL INFORMATION AND SCHEDULE
PROJECT PORTFOLIO MANAGEMENT SOLUTION

Scope of Services

The City of Jacksonville Information Technologies Division (ITD) is requesting proposals to fulfill a Project and Portfolio Management Software as a Service (SaaS) Solution to reengineer business processes and deliver transparent insight into the IT business portfolio. The proposed solution should empower leadership with the tools necessary to provide strategic alignment, effective team collaboration, and improved decision making thus contributing to organizational effectiveness. ITD currently has approximately 116 employees in various positions that may or may not utilize the solution. The solution may be expanded to other departments within the City of Jacksonville in the future.

Award

The City of Jacksonville will evaluate the proposals for Project and Portfolio Management Solution. The top two (2) scoring evaluated proposals will be invited to interview/demo of their proposed system. The interview/demo will be evaluated and combined with the RFP evaluation score. The final evaluated score will be the average of the evaluated bid response and interview/demo scores. The highest scoring contractor will be awarded the implementation of the Project Portfolio Management Solution as SaaS for one (1) year, with two (2) one (1) year renewal options.

RFP Schedule

Activity	Date
RFP Published	July 13, 2016
Optional Pre-Bid Meeting	July 20, 2016 at 11:00A.M.
Questions Deadline	July 18, 2016 by 10:00A.M.
Proposal Deadline	July 27, 2016 by 2:00P.M.
Demos/ Interviews (Top Two Proposers)	TBD
Estimated Contract Award	TBD

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SUBJECT: Project & Portfolio Management Solution (CSPEC)

BID #: ESC-0516-16 **OPEN DATE: 07/27/2016**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: One Time Purchase

AGENCY: Information Technologies Division

BASIS OF AWARD: To the Highest Scoring Bidder Based On The Evaluation Criteria

NUMBER OF BIDS INVITED: (12) NUMBER RECEIVED: (4) OTHER: (1)

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Approval was granted on 8/14/2016 for interviews/demonstrations of the two top scoring vendors: Change Point, dba Daptiv Solutions, LLC., and Rego Consulting Corporation. The sub-committee has completed the evaluation of the demonstrations and the averaged scoring of the bid response evaluation and the evaluation of the interview/demo for both vendors is listed below:

- Change Point dba Daptiv Solutions, LLC. 89.33
- Rego Consulting Corporation 79.06

Accordingly, recommend approval of award to the highest scoring vendor, Change Point dba Daptiv Solutions, LLC.. The total expenditure not-to-exceed $109,740.00.

Funding to be encumbered from account AFIT531CSCS-06431 to be issued by purchase order.

ATTACHMENTS: Recommendation Memo; Tabulation; Evaluation Matrix; Scoring Sheet; Previous Award

ANALYST: CHELSEY RENFROE

RESPECTFULLY SUBMITTED
GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: Kenneth Lathrop, Chief Information Officer, Information Technologies Division

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING Ø DATE: 10-13-16

OTHER:

ACTION OF AWARDING AUTHORITY DATE 10/13/16

APPROVED ✓ DISAPPROVED

OTHER

SIGNATURE OF AUTHENTICATION

Janet E. Moore
Chief Administrative Officer
For: Mayor Lenny Curry
Under Authority of
Executive Order No. 2015-05

SUBJECT: Project & Portfolio Management Solution (CSPEC)

BID #: ESC-0516-16 **OPEN DATE:** 07/27/2016

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: One Time Purchase

AGENCY: Information Technologies Division

BASIS OF AWARD: To the Highest Scoring Bidder Based On The Evaluation Criteria

NUMBER OF BIDS INVITED: (12) **NUMBER RECEIVED:** (4) **OTHER:** (1)

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
On July 27, 2016, the City of Jacksonville, Procurement Division received four (4) valid bid responses for subject bid and the Evaluation Committee has completed the review and ranked as follows:

- Change Point 95.35
- Rego Consulting Corporation 84.32
- Workfront 80.90
- UMT360 60.10

Recommend approval to move forward with the interview/demo of the top two (2) highest scoring bidders based on the evaluation criteria.

ATTACHMENTS: Recommendation Memo; Tabulation; Evaluation Matrix; Scoring Sheet

BUYER: KATHY NASWORTHY **RESPECTFULLY SUBMITTED**
GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: Kenneth Lathrop, Chief Information Officer, Information Technologies Division

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING — DATE: 8/11/2016

OTHER:

ACTION OF AWARDING AUTHORITY DATE 8/16/16

APPROVED ✓ DISAPPROVED

OTHER

SIGNATURE OF AUTHENTICATION