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: **Gregory Pease, Chief of Procurement** gp

DATE: **August 9, 2019**

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 vendor for **Tax Collection Management Solution**. 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 Plan.

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	

DUVAL COUNTY TAX COLLECTOR

www.coj.net/tc
taxcollector@coj.net

Jim Overton
TAX COLLECTOR

231 E. FORSYTH ST., SUITE 100
JACKSONVILLE, FLORIDA 32202-3356

TO: Gregory Pease, Chief of Procurement

FROM: Jim Overton, Tax Collector

SUBJECT: Certification Letter for Tax Collection Management Solution

DATE: July 23, 2019

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 Tax Collection Management Solution and related equipment for the Duval County Tax Collector's Office. The evaluated bid process is required due to the complexity of the scope and integration into the current operating environment, the differences among the vendors' solution and the importance of the qualifications of the providers versus a low bidder, open market method. In order to ensure that our minimum requirements are met, the evaluated process would be the fairest way to select the vendor. While cost and budget concerns will bear weight, the way in which the vendors accomplish the solution will have an impact on customer service and employee efficiency.

The estimated period of time the services will be required is five (5) years and three (3) one year renewal options.

The proposed project will not duplicate existing services and will replace outdated technology.

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 Tax Collector's Office.

The names and telephone numbers of the representatives designated to serve on the committee are:

Kevin Rock – 630-7593
Debra Doran – 630-1838
Alana Rogers – 348-0523
Cindy Raley – 255-5717
Michael Love – 630-4733

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

Thanking you in advance for considering our request.

Department of Finance and Administration
Procurement Division

CITY OF JACKSONVILLE

July 26, 2019

To: Greg Pease, Division Chief
Procurement Division

From: Teresa O. Bocchieri, Business Compliance Officer
Jacksonville Small and Emerging Business (JSEB) Compliance Office

RE: **Tax Collection Management Solution Software**

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-Aside %

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

If you need additional information I may be reached at (904) 255-8833.

cc: David Klages
Rose Nettles

Klages, David

From:	Willis, Ann on behalf of RiskReview
Sent:	Wednesday, August 07, 2019 4:25 PM
To:	Klages, David; RiskReview
Cc:	Rock, Kevin
Subject:	RE: Insurance Requirement for Tax Collection Management Solution
Attachments:	CSPEC RFP-Tax Collection Management Solution - with table - Draft 02RM Redline 8.7.19.doc; CSPEC RFP-Tax Collection Management Solution - with table - Draft 02RM Redline 8.7.19.pdf

Attached please find Risk Management's redline of the above RFP.
Also attached is the stamped Risk Management approved pdf.
Risk Management has concluded our review unless further assistance is required.

Ann Willis, AINS, CRIS
Property and Casualty Compliance Administrator
Risk Management Division
Department of Finance
City of Jacksonville
117 W Duval Street, Suite 335
Jacksonville, Fl 32202
(904) 630-7891 (o)
(904)630-2100 (f)
This e-mail transmission and/or attachment(s) is confidential and the contents are intended only for the recipient(s) named. It may contain information that is privileged, confidential and exempt from disclosure under applicable law. Any review, discussion, dissemination, distribution, or copying of this transmission (including any attachments) is strictly prohibited. If you have received this communication in error, please notify us immediately by return e-mail and delete the original message and any copies of it from your computer system. Improper disclosure of the information in this communication can result in fines and penalties under Federal, State and Local Law.

From: Klages, David
Sent: Thursday, July 25, 2019 3:57 PM
To: RiskReview
Cc: Rock, Kevin
Subject: Insurance Requirement for Tax Collection Management Solution

Good afternoon. Attached is an early draft of an RFP for Tax Collection Management software. I'm waiting on an estimated cost. Would you please review the indemnity and insurance requirements (Attachments G and H) and revise as needed?

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