Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

City of Jacksonville, Florida
Procurement Award Form (PAF)

Part 1: Form Type JPAC Award Request and Administrative Details

Goods and/or Services: Financial Wellness Services RFP (P-10-24)

Requested Action/Authority:

Requesting rejection of all bids for the Financial Wellness Services RFP (P-10-24) due to budgetary constraints. The project will be re-bid at a later date.

Justification/Explanation:

Legal Contract #:	N/A	Contract Date:		Change Order/AMD #:	N/A	
PO/Release #:	N/A	Bid Date:	11/08/2024	Awarded Supplier:	N/A	
Licenses Verified:	N/A	Effective Date:	11/21/2024	Basis of Award:	Highest Evaluated	
Federally Funded:	N/A	No. Invited:	N/A	Responses Received:	5	Attachments:
Solicitation:	RFP-NONCON P-10-24 - N/A			Procurement Contract #:	N/A - N/A	
Executed By:	N/A					

PoP:Base:	N/A	Options:	N/A	Extension(s):	N/A
JSEB Rec.:	Encouragement	%:	0	Bonds Waived Pursuant To:	N/A

Fund:	000000	Center:	000000	Acct:	000000	Proj:	0000000	Activity:	000000000	$	00000
Fund:		Center:		Acct:		Proj:		Activity:		$	
Fund:		Center:		Acct:		Proj:		Activity:		$	

New NTE/GMP:	$ N/A	Contingent Amount:	$ 0000000	DMP/ODPO Amount:	$ N/A

Using Agency/BU:	AFTR:TREASURY			
Concurrence:	Signed by: Merrill, Brennan 3C898BCF40E94BB...	Title:	CHIEF INVESTMENT OFFICER	11/12/2024
Concurrence:		Title:		
Concurrence:		Title:		
Concurrence:		Title:		

Procurement Analyst/Buyer:	Signed by: Wallace Cohen, Olive A7A7DE8878BC4DD...	Chief of Procurement:	DocuSigned by: B19F1D517352456... 11/18/2024
Name:	Wallace Cohen, Olive	Name:	Dustin L. Freeman

Part 2: JPAC Actions on Above Requests/Recommendations
All Award Actions Subject to Lawfully Appropriated Funds

Members Who Approve:	
Members Who Disapprove:	
Other Action:	

Date:

Part 3: Final Awarding Authority Action

Action:

Date:

Signature:

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

PAF Instructions

Form Type: Select the type of award from the dropdown options. This form will be used for all Procurement awards (Administrative Awards and JPAC Requests).

Goods and/or Services: Enter a brief description of the types of goods and services included in the request.

Requested Action/Authority: Enter a brief description of the requested action or authority being sought. i.e.; *request permission to award to the lowest, responsive responsible bidder for ITB or award the highest ranked supplier for an RFP*.

Justification/Explanation: Enter a brief justification or explanation for the requested action. Use this box to add any additional information such as additional account strings, or other information essential for contract execution.

Legal Contract Number: Provide the existing City contract number if applicable. This will be the same number as your POA number.

Contract Date: Select the effective date for the contract using the calendar option in the form. Leave blank for contracts to become effective on the execution date.

Change Order/AMD #: Provide the applicable Change Order or Amendment number represented by this request.

Date: Enter the date of PAF submission.

Effective Date: Enter the effective date of requested authority and/or action.

Solicitation: Select the competitive procurement method used (1Cloud generated prefix), enter the 1Cloud generated numbering sequence, and 1Cloud generated fiscal year of solicitation

Basis of Award: Select from Lowest Price Technical Acceptable (LPTA), Highest Price Technical Acceptable (HPTA),

Procurement Contract #: This is your PO number. Select Type, Enter Number

PO/Release Number: Enter PO Release Number

Awarded Supplier: Enter Awarded Supplier Name

Federally Funded: Select yes or no from dropdown if Federal Funds will be used.

Responses Received: This is the number of responses received.

No Bids Received: The number of responses received that indicated supplier would not bid.

Executed By: Select whether executed by OGC or JPAC / Chief of Procurement

PoP Base: Select the Period of Performance for the initial period.

Options: Period for each renewal period i.e. one (1) two (2) year.

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

Extensions: How many extensions have we preformed after the initial base period and option periods have been completed?

JSEB Goal: Select the percentage established by JSEB.

JESB Other: Select Encouragement or Set Aside Option

Bonds Waived Pursuant to: Select authority allowing bonds to be waived.

Funding Source: Fund/Center/Account/Project/Activity, all fields are required even if zeros.

New NTE/GMP: Enter the new total not to exceed the amount. Note, this should match the contract maximum indebtedness, if applicable**.**

Contingent Amount: If your agency requests an allowance for unforeseen additional expenses, then specify the amount of your requested increase and new NTE that represents the contingency allowance. This is over and above any quote.

DMP/ODPO Amount: Enter the total Direct Materials Purchase/Owner Direct Purchase Order amount for project.

Attachments: Name any attachments included as supplemental information to the PAF.

Using Agency/BU: This should be the requesting agency/requirement owner.

Concurrence: Electronic Signature

Title: Enter the title of person electronically signing form.

**Any fields where there is no data available, or no entry is required, either leave it blank or enter N/A. Any fields where there is known data, include for informational purposes. Any changes to an original award should contain the data that is being changed and any other relevant data required for JPAC review and approval.*

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

A NEW DAY.

City of Jacksonville, Florida
Finance Department
117 West Duval Street, Suite 300
Jacksonville, FL 32202
(904) 255-5364
www.Jacksonville.gov

We are requesting the rejection of all bids for the Financial Wellness Services RFP (P-10-24) due to budgetary constraints. We plan to re-issue the RFP at a later date.

Sincerely,

Brennan Merrell
Chief Investment Officer

Chris Cicero
Treasurer

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

Michelle

Proposal Receipt Form

Announcer_____ **Recorder** Melissa Pierce

PROJECT: **P-10-24**

FINANCIAL WELLNESS SERVICES

No. of Firms Responding to RFP 5 **No. of Companies Not Interested** 8

Enrich	(1) original (3) copies (6) USBs ( ) Financials
Gallagher	(1) original (3) copies (6) USBs ( ) Financials
Blend Financial Inc	(1) original (3) copies (6) USBs ( ) Financials
NFP	(1) original (3) copies (6) USBs ( ) Financials
Sage View	(1) original (3) copies (6) USBs (4) Financials (1) Redacted USB

IMPORTANT: The Subcommittee Report (Shortlist) for this project is scheduled to go before PSEC on or before_____, and Fee & Contract Negotiation Report is scheduled to go before PSEC on or before_____

Receipt of Proposals Acknowledged By:

_____ **DATE:**_____

ALL EVALUATORS ARE REQUIRED TO SCORE IN ACCORDANCE WITH THE SCORING CRITERIAL OUTLINED IN THE RFP. ALL EVALUATORS ARE REQUIRED TO SCORE INDEPENDENTLY. COMMUNICATION BETWEEN EVALUATORS AND WITH RESPONDENTS DURING THE EVALUATION PERIOD IS STRICTLY PROHIBITED.

Receipt of CD of Proposals Acknowledged By:

_____ **PSEC Chairman**

_____ **Equal Business Opportunity Office**

_____ **Treasury**

_____ **Office of General Counsel**

Revised May, 2014

P-10-24

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

PROCUREMENT DIVISION

A NEW DAY

NOTIFICATION OF RECOMMENDED BID REJECTION

Date: November 14, 2024

Via Email: pete@yourmoneyline.com

Bidder's Name: GALLAGHER FIDUCIARY ADVISORS, LLC

Address: 501 Riverside Avenue, Jacksonville, FL 32202

Contact Name: Peter Dunn

Bid No: P-10/24

Title: FINANCIAL WELLNESS SERVICES

Date Opened: April 10, 2024

REASON FOR RECOMMENDED BID REJECTION: Using Agency recommends **rejecting all bids** due to budget constraints. The specifications/requirements will be revised and rebid at a later date.

If you wish to protest the recommended rejection of this bid, please respond in accordance with the City of Jacksonville's bid protest procedures and email a copy to the City Purchasing Analyst associated with the protested bid.

NOTE: This intended action is only a recommendation to the appropriate Awarding Authority. The authority recommending award for this bid is the General Government Awards Committee scheduled for **Thursday, November 21, 2024 at 1:00 p.m.**

Purchasing Analyst's Signature: _____

Olive Wallace Cohen, Purchasing Analyst

214 N. Hogan St., Suite 800 | Jacksonville, FL 32202 | Phone: 904.255-8815 | Fax: 904.255-8837

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

Wallace Cohen, Olive - AFPS

From: Wallace Cohen, Olive - AFPS
Sent: Thursday, November 14, 2024 12:34 PM
To: pete@yourmoneyline.com
Subject: P-10-24 - FINANCIAL WELLNESS SERVICES
Attachments: P-10-24 Bid Rejection Notice - GALLAGHER FIDUCIARY ADVISORS, LLC.pdf

Good day Peter:

Please see attached notice for your information and files.

Best Regards,

Olive Wallace-Cohen
Purchasing Analyst
Office of Administrative Services
Procurement Division
214 N. Hogan Street (8th Floor)
Jacksonville, FL 32202
Phone: 904-255-8816
E-mail: OWCohen@coj.net

A New Day.
Jacksonville.gov

"Please note that under Florida's very broad public records law, email communications to and from City officials are subject to public disclosure."

Please click on the links below for any of the following for Bids and Awards:

For Bidding Opportunities: COJ.net - Bidding Opportunities (Including Capital Improvement and Design/Build)
For COJ weekly award intentions: COJ.net - Agendas and Minutes
For bid award information: Procurement Division (coj.net)
For Public Records: COJ Public Records (govqa.us)

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

PROCUREMENT DIVISION

A NEW DAY

NOTIFICATION OF RECOMMENDED BID REJECTION

Date: November 14, 2024

Via Email: jkelly@igrad.com

Bidder's Name: iGrad-Enrich Financial Wellness Program

Address: 2163 Newcastle Ave Cardiff by the Sea CA, 92007

Contact Name: Jennifer Kelly

Bid No: P-10/24

Title: FINANCIAL WELLNESS SERVICES

Date Opened: April 10, 2024

REASON FOR RECOMMENDED BID REJECTION: Using Agency recommends **rejecting all bids** due to budget constraints. The specifications/requirements will be revised and rebid at a later date.

If you wish to protest the recommended rejection of this bid, please respond in accordance with the City of Jacksonville's bid protest procedures and email a copy to the City Purchasing Analyst associated with the protested bid.

NOTE: This intended action is only a recommendation to the appropriate Awarding Authority. The authority recommending award for this bid is the General Government Awards Committee scheduled for **Thursday, November 21, 2024 at 1:00 p.m.**

Purchasing Analyst's Signature: _____
Olive Wallace Cohen, Purchasing Analyst

214 N. Hogan St., Suite 800 | Jacksonville, FL 32202 | Phone: 904.255-8815 | Fax: 904.255-8837

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

Wallace Cohen, Olive - AFPS

From: Wallace Cohen, Olive - AFPS
Sent: Thursday, November 14, 2024 12:26 PM
To: jkelly@igrad.com
Subject: P-10-24 - FINANCIAL WELLNESS SERVICES
Attachments: P-10-24 Bid Rejection Notice - iGrad-Enrich Financial Wellness Program.pdf

Good day Jennifer:

Please see attached notice for your information and files.

Best Regards,

Olive Wallace-Cohen
Purchasing Analyst
Office of Administrative Services
Procurement Division
214 N. Hogan Street (8th Floor)
Jacksonville, FL 32202
Phone: 904-255-8816
E-mail: OWCohen@coj.net

A New Day.
Jacksonville.gov

"Please note that under Florida's very broad public records law, email communications to and from City officials are subject to public disclosure."

Please click on the links below for any of the following for Bids and Awards:

For Bidding Opportunities: COJ.net - Bidding Opportunities (Including Capital Improvement and Design/Build)
For COJ weekly award intentions: COJ.net - Agendas and Minutes
For bid award information: Procurement Division (coj.net)
For Public Records: COJ Public Records (govqa.us)

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

PROCUREMENT DIVISION

A NEW DAY

NOTIFICATION OF RECOMMENDED BID REJECTION

Date: November 14, 2024

Via Email: Ldrake@sageviewadvisory.com

Bidder's Name: SAGEVIEW ADVISORY GROUP

Address: 1645 Palm Beach Lakes Blvd., Suite 1200, West Palm Beach, FL 33401

Contact Name: Lisa Drake

Bid No: P-10/24

Title: FINANCIAL WELLNESS SERVICES

Date Opened: April 10, 2024

REASON FOR RECOMMENDED BID REJECTION: Using Agency recommends **rejecting all bids** due to budget constraints. The specifications/requirements will be revised and rebid at a later date.

If you wish to protest the recommended rejection of this bid, please respond in accordance with the City of Jacksonville's bid protest procedures and email a copy to the City Purchasing Analyst associated with the protested bid.

NOTE: This intended action is only a recommendation to the appropriate Awarding Authority. The authority recommending award for this bid is the General Government Awards Committee scheduled for **Thursday, November 21, 2024 at 1:00 p.m.**

Purchasing Analyst's Signature: _____
Olive Wallace Cohen, Purchasing Analyst

214 N. Hogan St., Suite 800 | Jacksonville, FL 32202 | Phone: 904.255-8815 | Fax: 904.255-8837

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

Wallace Cohen, Olive - AFPS

From: Wallace Cohen, Olive - AFPS
Sent: Thursday, November 14, 2024 12:30 PM
To: 'Ldrake@sageviewadvisory.com'
Subject: P-10-24 - FINANCIAL WELLNESS SERVICES
Attachments: P-10-24 Bid Rejection Notice - SAGEVIEW ADVISORY GROUP.pdf

Good day Lisa:

Please see attached notice for your information and files.

Best Regards,

Olive Wallace-Cohen
Purchasing Analyst
Office of Administrative Services
Procurement Division
214 N. Hogan Street (8th Floor)
Jacksonville, FL 32202
Phone: 904-255-8816
E-mail: OWCohen@coj.net

A New Day.
Jacksonville.gov

"Please note that under Florida's very broad public records law, email communications to and from City officials are subject to public disclosure."

Please click on the links below for any of the following for Bids and Awards:

For Bidding Opportunities: COJ.net - Bidding Opportunities (Including Capital Improvement and Design/Build)
For COJ weekly award intentions: COJ.net - Agendas and Minutes
For bid award information: Procurement Division (coj.net)
For Public Records: COJ Public Records (govqa.us)

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

PROCUREMENT DIVISION

A NEW DAY

NOTIFICATION OF RECOMMENDED BID REJECTION

Date: November 14, 2024

Via Email: jamie.hayes@nfp.com

Bidder's Name: NFP RETIREMENT

Address: 1060 Maitland Center Commons, Suite 360, Maitland, FL 32751

Contact Name: Jamie Hayes

Bid No: P-10/24

Title: FINANCIAL WELLNESS SERVICES

Date Opened: April 24, 2024

REASON FOR RECOMMENDED BID REJECTION: Using Agency recommends **rejecting all bids** due to budget constraints. The specifications/requirements will be revised and rebid at a later date.

If you wish to protest the recommended rejection of this bid, please respond in accordance with the City of Jacksonville's bid protest procedures and email a copy to the City Purchasing Analyst associated with the protested bid.

NOTE: This intended action is only a recommendation to the appropriate Awarding Authority. The authority recommending award for this bid is the General Government Awards Committee scheduled for **Thursday, November 21, 2024 at 1:00 p.m.**

Purchasing Analyst's Signature: _____
Olive Wallace Cohen, Purchasing Analyst

214 N. Hogan St., Suite 800 | Jacksonville, FL 32202 | Phone: 904.255-8815 | Fax: 904.255-8837

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

Wallace Cohen, Olive - AFPS

From: Wallace Cohen, Olive - AFPS
Sent: Thursday, November 14, 2024 12:35 PM
To: jamie.hayes@nfp.com
Subject: P-10-24 - FINANCIAL WELLNESS SERVICES
Attachments: P-10-24 Bid Rejection Notice - NFP RETIREMENT.pdf

Good day Jamie:

Please see attached notice for your information and files.

Best Regards,

Olive Wallace-Cohen
Purchasing Analyst
Office of Administrative Services
Procurement Division
214 N. Hogan Street (8th Floor)
Jacksonville, FL 32202
Phone: 904-255-8816
E-mail: OWCohen@coj.net

A New Day.
Jacksonville.gov

"Please note that under Florida's very broad public records law, email communications to and from City officials are subject to public disclosure."

Please click on the links below for any of the following for Bids and Awards:

For Bidding Opportunities: COJ.net - Bidding Opportunities (Including Capital Improvement and Design/Build)
For COJ weekly award intentions: COJ.net - Agendas and Minutes
For bid award information: Procurement Division (coj.net)
For Public Records: COJ Public Records (govqa.us)

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

PROCUREMENT DIVISION

A NEW DAY

NOTIFICATION OF RECOMMENDED BID REJECTION

Date: November 14, 2024

Via Email: chad@useorigin.com

Bidder's Name: BLEND FINANCIAL INC., dba ORIGIN FINANCIAL

Address: 68 Harrison Avenue, Suite 605, PMB 50966, Boston, MA 02111-1929

Contact Name: Chad Schneider

Bid No: P-10/24

Title: FINANCIAL WELLNESS SERVICES

Date Opened: April 10, 2024

REASON FOR RECOMMENDED BID REJECTION: Using Agency recommends **rejecting all bids** due to budget constraints. The specifications/requirements will be revised and rebid at a later date.

If you wish to protest the recommended rejection of this bid, please respond in accordance with the City of Jacksonville's bid protest procedures and email a copy to the City Purchasing Analyst associated with the protested bid.

NOTE: This intended action is only a recommendation to the appropriate Awarding Authority. The authority recommending award for this bid is the General Government Awards Committee scheduled for **Thursday, November 21, 2024 at 1:00 p.m.**

Purchasing Analyst's Signature: _____
Olive Wallace Cohen, Purchasing Analyst

214 N. Hogan St., Suite 800 | Jacksonville, FL 32202 | Phone: 904.255-8815 | Fax: 904.255-8837

Docusign Envelope ID: FB4772F7-6DF4-421A-A701-6BE76B132DA8

Wallace Cohen, Olive - AFPS

From: Wallace Cohen, Olive - AFPS
Sent: Thursday, November 14, 2024 12:41 PM
To: 'chad@useorigin.com'
Subject: P-10-24 - FINANCIAL WELLNESS SERVICES
Attachments: P-10-24 Bid Rejection Notice - BLEND FINANCIAL INC., dba ORIGIN FINANCIAL.pdf

Good day Chad:

Please see attached notice for your information and files.

Best Regards,

Olive Wallace-Cohen
Purchasing Analyst
Office of Administrative Services
Procurement Division
214 N. Hogan Street (8th Floor)
Jacksonville, FL 32202
Phone: 904-255-8816
E-mail: OWCohen@coj.net

A New Day.
Jacksonville.gov

"Please note that under Florida's very broad public records law, email communications to and from City officials are subject to public disclosure."

Please click on the links below for any of the following for Bids and Awards:

For Bidding Opportunities: COJ.net - Bidding Opportunities (Including Capital Improvement and Design/Build)
For COJ weekly award intentions: COJ.net - Agendas and Minutes
For bid award information: Procurement Division (coj.net)
For Public Records: COJ Public Records (govqa.us)