City of Jacksonville, Florida

DONNA DEEGAN, Mayor

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

A NEW DAY.

MEMORANDUM

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

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

DATE: **October 19, 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 a supplier for **Personal Exemptions Audit Service**. 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.

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

JOYCE MORGAN
DUVAL COUNTY
PROPERTY APPRAISER

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

TO: Dusting Freeman, Chief of Procurement

FROM: Desi Green, Chief Financial Officer
Property Appraiser's Office

SUBJECT: Request for RFP

DATE: October 4, 2023

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 length of contract will be from the date of contract execution through September 30, 2024, with four (4) one-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:
Desi Green
Joyce Morgan
Keith Hicks

Department of Finance and Administration

Procurement Division

CITY OF JACKSONVILLE

September 25, 2023

To: Dustin L. Freeman, Division Chief
Procurement Division

From: Gregory Grant, EBO/JSEB Administrator
Karem Baez, EBO/JSEB Business Compliance Analyst
Jacksonville Small and Emerging Businesses

RE: **Personal Exemptions Audit Service**

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) 255-8833.

Cc: David Klages
Gregory Grant