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 Year from Date of Award, with Two (2), One (1) Year Renewal Options

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 amend award dated 10/14/2016 to Change Point dba Daptiv Solutions, LLC., to amend the period of service to align with the executed contract. The revised period of service will be one year from 04/06/2017, with two (2), one (1) year renewal options. The total expenditure to remain unchanged at $113,954.00.

ATTACHMENTS: Recommendation Memo; Contract; Section 4; 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

11/03/17 10:31:21
Procurement Division

October 31, 2017

TO: **Greg Pease, Chief of Procurement**
Procurement Division

FROM: **Michael Turner, PMO Manager** Michael Turner
Information Technologies Division

THRU: **Kenneth Lathrop, Chief of Information Technologies/CIO** Kenneth E. Lathrop

10/31/17

SUBJECT: **Request to Amend Award ESC-0516-16 for Project Portfolio Management Solution**

The Information Technologies Division requests to amend the Award ESC-0516-16 to co-term with the executed Contract 10293 for the Project Portfolio Management Solution to Change Point dba Daptiv Solutions, LLC. The Award was approved on 10/13/2016 and the contract was signed on 4/6/2017.

The subscription of services began on 4/6/2017. The revised amended award would be from the period of 4/6/2017 thru 4/5/2018. This would include two (2) one (1) year renewal options.

Your favorable consideration of this request is appreciated.

CC: **Michele Harrell, ITD Senior Project Manager**
Tom Ossi, Technology Contract and Records Manager T. Ossi

10293

SERVICES CONTRACT

BETWEEN
THE CITY OF JACKSONVILLE
AND
DAPTIV SOLULTIONS, LLC
FOR
PROJECT PORTFOLIO MANAGEMENT SOLUTION

THIS CONTRACT, made and entered into this 10 day of ~~March~~ April, 2017 (the "Effective Date"), by and between the **CITY OF JACKSONVILLE** (the "CITY"), a municipal corporation existing under the Constitution and the laws of the State of Florida, and **DAPTIV SOLULTIONS, LLC** (the "CONTRACTOR"), a Delaware limited liability company authorized to transact business in Florida and with its principal offices at 1111 Third Avenue, Suite 700, Seattle, Washington 98101.

WHEREAS, the CITY issued a Request for Proposal No. BID#ESC-0516-16 which is on file with the CITY (the "RFP"), for certain services described in the RFP (the "Services"); and

WHEREAS, based on CONTRACTOR'S response to the RFP dated July 27, 2016 which is on file with the CITY (the "Response"), the CITY has negotiated and awarded this Contract to CONTRACTOR;

NOW THEREFORE, in consideration of the premises and the mutual covenants contained below, the parties agree as follows:

1. Performance of Services. CONTRACTOR shall perform the Services as specified in the RFP and the Response. The Services shall include the implementation, training and integration services described in the Statement of Work for the City of Jacksonville attached to this Services Contract as Attachment 1 (the "SOW") and the hosting services described in the Daptiv Hosted Subscription Agreement attached to this Contract as Attachment 2 (the "Subscription Agreement").

2. Compensation. CITY will pay CONTRACTOR the fixed sum of $54,679.20 for the implementation, training and integration services described in the SOW on a time and materials basis as provided in the SOW. Payment terms shall be governed by the RFP. CITY will pay CONTRACTOR the fixed sum of $54,904.00 for the hosting services described in the Subscription Agreement as per the terms of the Subscription Agreement.

3. Maximum Indebtedness. As required by Section 106.431, Ordinance Code, the CITY's maximum indebtedness for all products and services under this Contract shall be a fixed monetary amount not-to-exceed **One Hundred Nine Thousand Seven Hundred Forty and no/100 Dollars ($109,740.00).**

4. Term. The term of this Contract shall commence on the Effective Date and shall continue For a one year period following the Effective Date. The City, in its discretion, shall have the option to renew this Contract for two additional one-year periods. Certain provisions of this Contract may extend past termination including, but not limited to, the warranty, maintenance, service and indemnification provisions contained in the RFP, the Response and this Contract (including the Attachments hereto).

5. Confidentiality. CONTRACTOR acknowledges and agrees that CITY is subject to the requirements of Article 1, Section 24, Florida Constitution and Section 119.011, Florida Statutes and

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:
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

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

MEMBERS APPROVING 5 MEMBERS DISAPPROVING Ø DATE: 10/19/17

OTHER:

ACTION OF AWARDING AUTHORITY DATE 10/19/17

APPROVED DISAPPROVED

OTHER

SIGNATURE OF AUTHENTICATION

Sam E. Mousa
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:
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

Sam E. Mousa
Chief Administrative Officer
For Governor Lenny Curry
Under Authority of
Executive Order No. 2015-05

SUBJECT: Project & Portfolio Management Solution (CSPEC)

BID #: ESC-0516-16 OPEN DATE: 07/27/2015

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

Sam E. Mousa
Chief Administrative Officer
For Mayor Lenny Curry
Under Authority of
Executive Order No. 2015-05