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City of Jacksonville, Florida

Lenny Curry, Mayor

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

ONE CITY. ONE JACKSONVILLE.

MEMORANDUM

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

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

DATE: **March 30, 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 **Resolution of Heir's Property Issues**. 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	

City of Jacksonville, Florida

Lenny Curry, Mayor

Housing and Community Development Division
Ed Ball Building
214 North Hogan Street, 7th Floor
Jacksonville, FL 32202
(904) 255-8200
www.coj.net

ONE CITY. ONE JACKSONVILLE.

MEMORANDUM

DATE: **March 10, 2023**

TO: **Dustin Freeman, Chief of Procurement**
Finance and Administration Department

THRU: **Chiquita Moore, Director**
Neighborhoods Department

FROM: **Tom Daly, Chief of Housing and Community Development**
Neighborhoods Department

SUBJECT: **CSPEC RFP Request: Heir's Property Resolution**

The Housing and Community Development Division is requesting permission to utilize the Competitive Sealed Proposal Evaluation Committee to request proposals for non-recurring grant funds to create and operate Heir's Property Resolution.

The City of Jacksonville, Neighborhoods Department, Housing and Community Development Division has an appropriation of $400,000.00 in non-recurring grant funds and is requesting proposals to address heirs' property issues in Duval County through title clearing, estate planning, and resident education. This project will be funded via the State Housing Initiative Partnership ("SHIP") program made available to the City from the Florida Housing Finance Corporation ("FHFC"). The proposals will be scored by myself, Melody Duncan, Executive Assistant, and Travis Jeffrey, Affordable Housing and Community Development Administrator.

The funding for this award will be from the State Housing Initiative Partnership Program, Heir's Property Resolution line item, and account string 11701.174106.582001.010543.00000000.00000.0000000 of BT 22-075 (2022-0363).

Please do not hesitate to contact me at 255-8204 or tdaly@coj.net if you have any questions.

Cc: David Klages, Purchasing Analyst, Procurement

Department of Finance and Administration

Procurement Division

CITY OF JACKSONVILLE

March 9, 2023

To: Dustin L. Freeman, Division Chief
Procurement Division

From: Dinah Mason, EBO/JSEB Administrator DLM
LaRoy Covington, EBO/JSEB Business Compliance Officer JC
Jacksonville Small and Emerging Businesses

RE: **Resolution of Heins' Property Issues**

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: Dave Klages
Dinah Mason

Klages, David

From:	Verdejo Magras, Wanda on behalf of RiskReview
Sent:	Friday, March 10, 2023 11:33 AM
To:	Klages, David
Subject:	RISK REVIEW & CONCLUDED: Resolution of Heir's Property Issues
Attachments:	INV AND PAYMENT-Resolution of Heirs' Property Issues - Draft 01.pdf; REDLINED Resolution of Heirs' Property Issues - Draft 01.pdf; REDLINED INS REQ -Resolution of Heirs' Property Issues - Draft 01.pdf; SCOPE-Resolution of Heirs' Property Issues - Draft 01.pdf; RELINED FORM 2 -Resolution of Heirs' Property Issues - Draft 01.pdf

Greetings,

Thank you for allowing Risk Management an opportunity to review your request.

Summary:

- Indemnification is accepted by Risk (**Attachment G**)
- Within the Insurance requirements, I remove the Crime policy , because as per the scope its my understanding its not required. (**Attachment H**)
- **Insurancve Agent Acknowledgment Form 2 pg. 55**- I do not know who implemented "Insurance Agent Acknowledgment Form 2 to be added in the bid, contracts, or agreements. My view on the matter is as follows...If you wish to omit the form, I am ok with it because it's the applicant's responsibility to ensure their insurance agent complies with all the contract's insurance requirements. Some insurance agents are refusing to sign the form and it's creating havoc with contract compliance.

Unless there is any further question, Risk Management concludes the review.

NOTE: Please label all emails correspondence: Subject: Resolution of Heir's Property Issues (Neighborhoods)

Any further questions, please feel free to contact me.

NOTE: All emails sent to Wverdejo@coj.net **&** RiskReview@coj.net

Any further questions, please feel free to contact me.

Cordially,

Wanda Verdejo