3

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: **Dustin Freeman, Chief of Procurement**

DATE: **February 23, 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 **Foreclosure Intervention Program**. 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

Neighborhoods Department
Neighborhood Property Administration
214 N. Hogan St. 7th FL
Jacksonville, FL 32202
(904) 255-8200

ONE CITY. ONE JACKSONVILLE.

MEMORANDUM

DATE: February 6, 2023

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

THRU: Thomas J. Daly, II, Esq.
Chief, Housing & Community Development Division

FROM: Robert Ownby, Housing Property Administrator
Neighborhoods Department

SUBJECT: **CSPEC – ESC-0312-23 Foreclosure Intervention Program RFP**

The Housing and Community Development Division is requesting permission to utilize the Competitive Sealed Proposal Evaluation Committee (CSPEC) for the procurement of HUD Certified Housing Counseling Agencies for the services of Foreclosure Intervention, Counseling and Mediation. We feel that the CSPEC process is the most appropriate for this procurement of services because we intend to award multiple applicants through this RFP.

The purpose of the Foreclosure Intervention Program is to provide an opportunity to income qualified homeowners the ability to avoid foreclosure and retain their homes. This is achieved through direct assistance to the homeowner, in-depth counseling to address financial issues and advocacy with mortgage servicers or lenders by HUD Certified Housing Counseling Agencies.

The City will award up to a total of $200,000 of funding to be divided among the contracts awarded under this RFP. The initial term of the agreement will commence upon execution of the contract and will continue for a one-year period. The vendor will have the option to renew the agreement for up to two additional one-year terms upon satisfactory performance. The proposals will be scored by myself, Nicole Spradley, and Travis Jeffrey.

The funding for this award will be:

Line Item/Account Titles	Fund	Center	Account	Project*	Activity	Interfund	Future
Contractual Services – Other Grants/Aids	11601	174107	534100	010440	00000000	00000	0000000

It is our desire that this be awarded in the form of a contract upon selection of the winning vendor(s). Please do not hesitate to contact me at 255-8283 or rownby@coj.net if you have any questions.

Thank you for considering this request.

CC: David Klages, Purchase Analyst – Procurement Division

Department of Finance and Administration

Procurement Division

CITY OF JACKSONVILLE

January 27, 2023

To: Dustin L. Freeman, Division Chief
Procurement Division

From: Dinah Mason, EBO/JSEB Administrator
Karem Baez, EBO/JSEB Business Compliance Officer
Jacksonville Small and Emerging Businesses

RE: **Foreclosure Intervention Program**

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) 255-8167

Cc: Dave Klages
Dinah Mason

Klages, David

From: Ehrman, Itzel
Sent: Wednesday, February 1, 2023 11:59 AM
To: Klages, David
Subject: Concluded Review - Review of Bid Documents: Foreclosure Intervention Program
Attachments: Exhibit H Insurance Requirements.docx

Greetings,

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

I consulted the details of the agreement and the following recommendations were made.

Summary:

We have reviewed the Risk Review for the RFP for Foreclosure Intervention Program services.

We have no recommended changes to the Indemnification Provisions in Exhibit G of the RFP. These are the City's standard provisions and, in our opinion, they are appropriate.

We do have two recommended changes to the Exhibit H of the RFP – Insurance Requirements. We have saved this exhibit in Word to show our changes.

- In Exhibit H, we recommended deleting the requirement for Technology Errors and Omissions coverage within the Professional Liability section.
- We also are recommending adding Cyber liability because the vendors will be maintaining private financial information for the citizens participating in the program.

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

NOTE: Please label all emails correspondence: Subject:

Any further questions, please feel free to contact me.

Cordially,

Itzel Ehrman
Property and Casualty Compliance Analyst
City of Jacksonville
117 West Duval Street, Suite 335
Jacksonville, FL 32202-3381
Phone: 904-255-5315