



Building Community®

Procurement Department Bid Office
225 N. Pearl St.
Jacksonville, Florida 32202

November 19, 2024

ADDENDUM NUMBER: One (1)

TITLE: Record Retention Consulting Services

JEA SOLICITATION NUMBER: 1411879246

RESPONSE DUE DATE: November 26, 2024

TIME OF RECEIPT: 12:00 PM

TIME OF OPENING: 2:00 PM

THIS ADDENDUM IS FOR THE PURPOSE OF MAKING THE FOLLOWING CHANGES OR CLARIFICATIONS:

1. **Question:** Will proposals that exceed JEA's estimate of the 40 hours specified in Appendix B be considered if the calculation of required hours is fully explained?

Answer: Yes.

2. **Question:** What is the difference between a defining authority and a mapped authority in JEA's retention Schedule?

Answer: A defining authority gives the retention period we are using for the records series. A mapped authority is one which we reference but does not provide the retention period we are using.

3. **Question:** Is there a reason why some record series in the retention Schedule have no defining authority?

Answer: Record series which have business need as the authority do not have a defining authority because we are not using a citation as the reason for the retention period.

4. **Question:** The RFP lists the project as 40 hours. Is this a suggestion, or cap? How much is budgeted for this project.

Answer: 40 is to gauge a price and keep everyone level for price analysis.

5. **Question:** Regarding the solicitation, section 2.65: Is this section applicable to the work being performed as outlined in the RFP?

Answer: Section 2.65, JEA Critical Infrastructure Protection (CIP), certification is not applicable for this Work. NERC standards are authoritative for retention of records and should be considered in the analysis of JEA's retention Schedule.

6. **Question:** Regarding the solicitation, sections 1.13 and 2.49: Are liquidated damages applicable to this RFP? If so, what are the number of days and dollar amount as outlined in Sec. 2.49?

Answer: Sections 1.13 and 2.49, Liquidated Damages, are not applicable for this Contract.

7. **Question:** The RFP states that JEA is looking for "complete a regulatory, compliance and due diligence review." Which of the following are either required or optional elements?

- a. Determine any record types not in the current Schedule.
- b. Expand retention to include business value.
- c. Determine which records contain personal information and resolve conflicts in the Schedule between privacy data minimization requirements.
- d. Redesign and consolidate Schedule into more best practices format.
- e. Validate correct legal retention periods.
- f. Create an index of all citations (separate from Virgo).
- g. Publish Schedule using native M365.

Answer: The Work for a regulatory, compliance and due diligence review shall include identifying omissions and errors in the Schedule, reviewing appropriate retention for business value (current Schedule includes business value retention if provided by the business unit), and ensuring legal and regulatory retention periods are correct and appropriate.

It is not expected the Schedule will need to be completely redesign. The Schedule is already bucketed into functional categories. Optimization to condense the Schedule and align with best practices is desired. Virgo includes an index of all citations. A comprehensive spreadsheet from Virgo with JEA's Schedule will be exported for the selected Consultant.

Publishing the Schedule in M365 is not required or considered with this Work. Optimizing the Schedule to be included in a future state M365 is desired, including consideration of out of the box M365 content types as descriptors in JEA's Schedule. JEA will use the updated and revised Schedule to further classify records retention and if appropriate, align with sensitivity labels. The final Schedule may reside in Virgo or may be placed in another format or SAAS.

8. Question: How did you determine which companies to invite to participate in this solicitation?

Answer: The Information Governance team and Procurement researched various industry groups and the Internet to find companies who may be qualified to participate. Additionally, this solicitation has been publicly advertised.

9. Question: Can any exceptions be taken to the terms and conditions within the bid?

Answer: Yes, if you have any. Any redlines or exceptions you can send over before the bid closes. That way we can review and send updates for everyone.

10. Question: Is the 40 hours an estimate or absolute? It does not seem like 40 hours will do it.

Answer: It is estimated.

11. Question: Are we expected to validate all the citations in the Schedule, because it is loaded with citations?

Answer: Our retention Schedule was reviewed in 2022. We are an electric, water, and sewer utility in northeast Florida. Our defining authorities are finite. Persuasive authorities are included where appropriate. We have included business unit retention requirements as well. It is expected that the selected Consultant will be familiar enough with the legal and regulatory requirements and best industry practices to determine appropriate citations without extensive research.

12. Question: Will the Schedule continue to be housed in Virgo?

Answer: Our current contract with Virgo expires in February 2025. This solicitation does not consider a new SAAS. It is unknown at this time whether JEA will have the Virgo platform beyond February 2025.

13. Question: Does this Work include creation of new records classes/series or is the current structure sort of intact today?

Answer: This Work includes making JEA's Schedule better, aligning it with best practices, ensuring employees can easily understand retention requirements, and readying it for inclusion in M365. JEA will take into consideration the selected Consultant's advice to optimize its retention Schedule while meeting regulatory and legal requirements.

14. Question: You mentioned if you go back to the references, you want the contract value. 99.9% of commercial entities that you do this work for are under nondisclosure. As a vendor that is not something we share.

Answer: If you are not permitted to share it, you don't need to. It is a standard reference question we include in our bids.