

RETENTION SCHEDULE REVIEW CONSULTING SERVICES

Scope of Work

The purpose of this Request for Proposals (RFP) is to select a qualified Company to complete a regulatory, compliance and due diligence review of JEA's current Retention Schedule to confirm that it is compliant with all applicable laws, best practices, and JEA business needs. This process will assist JEA in maturing our Information Governance program by ensuring information integrity and compliance with legal and regulatory requirements.

Technical Specifications:

Background:

JEA's Big Bucket Retention Schedule currently has 130 records series which are aligned primarily with State of Florida records requirements, although there are a few Federal Government requirements, business needs and best practices included. The Retention Schedule is hosted within the Virgo Cloud Database, posted to JEA's Intranet and accessible to all employees. The current contract to host the Retention Schedule within Virgo will expire in February 2024. The last third-party review was in 2022.

JEA intends to award one contract for this review.

It is anticipated 100% of these services can be completed remotely.

JEA is NOT looking for integrations or third-party software at this time. JEA has started to incorporate the Retention Schedule into MS365. JEA will make consultant's recommended changes and updates to the Retention Schedule. Any clarifications and questions during the Work can be answered by the Information Governance team. There should be no need for discussions with JEA business units or departments.

Term:

Contract completion.

Evaluation Criteria:

Ability to design an approach and work plan to meet SOW requirements: 25 points

JEA will determine suitability and quality of the approach and methodology considering, but not limited to, the following:

- Describe your services and provide a real-world example from another company for which you performed a retention schedule review. Include issues that may have come up and how you resolved them.
- Provide an outline of steps you would take to perform a retention schedule review.

- Based on the provided JEA retention schedule
 - Estimate time for review and mark-up
 - Methodology for review and ensure it is complete and accurate

Experience and success of lead consultant and team: 25 points

- Please provide the name(s) and qualifications of your planned review team. Please include areas of expertise and length of expertise. Include certifications, education, records and information experience, and past experience with record retention schedules.

Price: 50 points

Time & Material Rate: \$_____USD/HR x 40 hours (estimated) = _____

Rate is fixed, fully burdened, for contract completion.