

SHELTERED MARKET REVIEW FORM

Project Title: E-Discovery Legal Solution **Agency Contact:** Rene D. Harrod

This form is to review projects estimated within the Sheltered Market Solicitation threshold (\leq \$250K fixed or initial term). This form **does not apply** for sole source projects, qualified vendor list projects, or for any federal, state, or other grant-funded projects. Please submit the completed form to sbcomp@broward.org.

Type of Contract: Check the type of contract; include dollar amount and the number of years.

- ☐ Fixed Contract Estimate: _____ Year(s) of contract
☒ Initial Contract Term Estimate: \$100,000/year 5 Year(s) of contract
☐ Estimate Including Renewals: _____ Year(s) of contract

Funding Source: ☒ County ☐ State ☐ Federal ☐ Penny for Transportation

Type of Purchase: Check one and include all applicable [NAICS code\(s\)](#).

- ☐ Commodity ☐ Commodity and Service (e.g. supply and install)
☒ Contract Service ☐ Construction Project (e.g. supply and install, with licensing)

NAICS CODES: 513210 518210 _____

Sole Brand Solicitation: Is this a Sole Brand solicitation? ☐ Yes ☒ No

If Yes, is there a limited distribution vendor list? ☐ Yes ☒ No If "Yes", **attach a list of sole brand vendors.**

Supporting Information for Review:

Scope of Work:

Seeking Requests for Letters of Interest (RLI) from qualified software licensors for the provision of a hosted software/subscription, including implementation and software support and maintenance, for an e-Discovery Legal Solution, offered as a "Software as a Service" ("SaaS") model, for large-scale document deduplication, de-NISTing, coding, categorizing, annotating, producing, etc. for litigation or public records purposes. The electronic discovery ("e-Discovery") solution will allow the Broward County Office of the County Attorney to process, analyze, review, convert, and produce electronically stored information ("ESI") of varying file types and formats, and from a variety of operating systems and electronic devices, as part of discovery litigation or in response to Florida Public Records Requests. The vendor must be the licensor or a certified or authorized distributor/reseller of the licensor software/subscription solution proposed.

Has this commodity/service been previously provided to the County? ☒ Yes ☐ No

List Vendor Name(s) if previously supplied:

Logikcull;
Complete Discovery Source (authorized licensor of Relativity)

The following documents **MUST** be attached:

- ☒ Specifications ☒ Insurance Requirements Document from Risk Management
☐ Licensing Requirements* ☐ Additional Applicable Supporting Documentation**

*If Not Applicable, this must be stated in writing; **e.g. Sole Brand/Source Request, Sole Brand Vendors List

➔THIS SECTION IS FOR OFFICE OF ECONOMIC AND SMALL BUSINESS DEVELOPMENT USE ONLY➔

Solicit to **Sheltered Market***** ☐ Yes ☒ No (**Review for Procurement Preference**)

***If no SBE vendor applies or this is not awarded from the Sheltered Market solicitation, then:

- ☒ Solicit to **Non-Sheltered Market**. **No goals will apply** to this solicitation.
☒ **REVIEW FOR PROCUREMENT PREFERENCE**
☐ Solicit to **Non-Sheltered Market**. **Goals may apply** to this solicitation. Using agency must submit a Request for Goal Assignment Form at that time.

OESBD Approver (Name / Title): _____ Date: _____

OESBD Approver Signature: SANDY-MICHAEL MCDONALD Digitally signed by SANDY-MICHAEL MCDONALD
Date: 2023.06.27 12:28:58 -04'00'