

## 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](mailto: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'