

## Patricia Lewis

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**From:** plewis@ocalafl.gov  
**Subject:** FW: Your policy exception has been approved.

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**From:** City of Ocala - Contracting Officer <[noreply@jotform.com](mailto:noreply@jotform.com)>  
**Sent:** Monday, October 16, 2023 10:50 AM  
**To:** Danielle Phillips <[dphillips@ocalafl.gov](mailto:dphillips@ocalafl.gov)>; Lyndi Dyson <[ldyson@ocalafl.gov](mailto:ldyson@ocalafl.gov)>  
**Subject:** Your policy exception has been approved.

Your policy exception has been **approved**.

**Approval Comments:** Public Works Sanitation Division has utilized the Dude Solutions (now known as Brightly Software) Mobile311 work order system for several years. In addition to having a work order system, Sanitation also has an ongoing need for a routing software solution to assist it in effectively handling its duties related to balancing routes, tracking, and quality assurance. Without routing software, supervisors are having to manually review tickets to check and calculate tonnage and distance to balance routes and quality assurance responsibilities are often handled reactively (after receiving customer complaints) than proactively (by checking locations in real time). The Brightly Software solution does not offer a routing component. Rubicon is an all-inclusive solution that offers both work order and routing capabilities. Sanitation has demonstrated the software for several months and found that it comprehensively addresses its needs. Rubicon was also competitively solicited and awarded under Sourcewell Contract No. 020221-RUB, Fleet Management Technology Solutions. Contract No. 020221-RUB is valid through March 26, 2025. In addition to competitive pricing, Rubicon is willing to grant the City of Ocala an additional 30% discount. PLEASE CREATE A MUNIS CONTRACT SO THAT PURCHASES CAN BE EFFECTIVELY TRACKED. PLEASE ENSURE THAT THIS EXCEPTION REQUEST AND SOURCEWELL CONTRACT NO. 020221-RUB ARE APPROPRIATELY ATTACHED TO THE MUNIS CONTRACT. IF YOU ANTICIPATE THAT EXPENDITURES UNDER THIS CONTRACT FOR THE TERM WILL EXCEED \$50,000, PLEASE SCHEDULE FOR A COUNCIL AGENDA.



**Select exception type:**

Procurement

**Reason for procurement exception:**

Policy Exception for Best Value/Approach

**Enter a brief description of your exception request:**

In 2018, Sanitation began using a work order system through Dude Solutions. The system met our needs and has been a very good system for us. We began to look for a system that would not only provide a means for us to do work orders but would also provide routing capabilities. Dude Solutions confirmed that they do not offer any routing software options. While looking, we came across Rubicon, which is a digital waste and recycling solutions company (<https://www.rubicon.com>). Their system provides both work order and routing software capabilities. Their system also provides electronic vehicle inspections and the ability to input tickets electronically, rather than manually, numerous reports, etc. It will also allow assigning routes to other drivers and make route changes very easily. This system will allow us to improve our operational efficiencies in both Residential and Commercial Sanitation, especially with the utilization of the routing optimization. Rubicon offered a 3 month, no-cost pilot program and, after working with Procurement, we began the pilot with Rubicon Global on July 31, 2023. We have been very pleased with their product, and we have determined through the pilot that the system does meet our needs. Renewing with Dude Solutions for another year would cost \$15,000 and was due in October, so we have terminated that contract. We would now like to enter into a 5-year contract with Rubicon Global for our work order and routing software needs. They are a part of the Sourcwell Purchasing Cooperative. A contract for this length of time will allow us to receive a 30% discount in costs. Rubicon is continually making upgrades to their system and those upgrades are provided to their clients at no additional cost. We are responsible for supplying the tablets for the program and here would be no installation or hardware required, due to the city utilizing their own

tablets and not utilizing a telematics device. The only required connection from the City will be access to their browser-based dashboard, which is username and password protected. This can be utilized by any web browser (Google Chrome preferred.)

Because the tablets we currently have are older, the Rubicon app will not work on them. Our tablets will need to be replaced. Tablet replacements are on the City Council agenda for October 24, 2023. Because of the way Rubicon is set up on the tablets, we will be able to reduce the total number of tablets that Sanitation has. IT has given the go ahead to start the Procurement contracting process and we have requested \$60,000 in our FY24 budget.

**Attach all documents related to the exception that can assist the Contracting Officer's decision.**

[Sourcewell Contract 020221-RUB.pdf](#)  
[Attachment C - SOC2 Confirmation Letter.pdf](#)  
[MSA Ocala.docx](#)  
[Rubicon MOU.City of Ocala.4.26.23.docx.pdf](#)

**Department**

(PWD) PUBLIC WORKS

**Requestor Name**

Dwayne Drake

**Requestor Email**

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**Who authorized requesting this exception?**

Dwayne Drake