

**From:** [Patricia Lewis](#)  
**To:** [Danielle Phillips](#)  
**Subject:** FW: Your policy exception has been approved.  
**Date:** Tuesday, September 3, 2024 10:11:27 AM

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Hi Danielle,

Here's the policy exception approval from Daphne.

We will be on the look out for a contracting request.

Thanks!

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**From:** City of Ocala - Contracting Officer <noreply@jotform.com>  
**Sent:** Tuesday, September 3, 2024 9:40 AM  
**To:** Darren Park <dpark@ocalafl.gov>; Michelle Brooker <mbrooker@ocalafl.org>; Patricia Lewis <plewis@ocalafl.org>; Shayatta J. Roberts <SJRoberts@ocalafl.org>; Daphne Robinson <d Robinson@ocalafl.org>; Ashley Presley <APresley@ocalafl.gov>  
**Subject:** Your policy exception has been approved.

Your policy exception has been **approved**.

**Approval Comments:** [drobinson@ocalafl.org](mailto:d Robinson@ocalafl.org)

The department is approved to piggyback the contract awarded to Raftelis Financial Consultants by the City of Daytona Beach, Contract No. 19632, for the provision of utility rate and evaluation consulting services through March 3, 2025. These services were competitively solicited by City of Daytona Beach under RFP No. 19632. Two vendors responded to the solicitation. On October 8, 2019, the Selection Committee awarded a single continuing contract to Raftelis Financial Consultants of Maitland. The original contract was awarded for a term of two years from March 4, 2019 through March 3, 2022. Since then, the contract has been renewed for all three available renewal terms with the most recent expiring on March 3, 2025. Raftelis has agreed to extend pricing and services to the City of Ocala under the same terms and conditions as Contract No. 19632. This pricing has been found to be fair and reasonable by staff and Procurement. PLEASE ESTABLISH A MUNIS CONTRACT NUMBER AND ISSUE A REQUEST TO CONTRACTING SO THAT A FORMAL PIGGYBACK AGREEMENT CAN BE PREPARED. IF THE DEPARTMENT ANTICIPATES SPENDING MORE THAN \$50,000 WITH THE VENDOR BEFORE THE EXPIRATION OF THE CONTRACT TERM (MARCH 3, 2025), THEN THE CONTRACT NEEDS TO BE PLACED ON A COUNCIL AGENDA. PLEASE ENSURE THAT THIS EXCEPTION APPROVAL IS ATTACHED TO THE MUNIS CONTRACT, CONTRACT REQUEST, AND AGENDA ITEM (IF ANY).



## Procurement/Contract/P-Card Exception

Select exception type:

Procurement

Reason for procurement exception:

Piggyback Request in Lieu of Bid

Enter a brief description of your exception request:

I am asking to piggyback an agreement between the City of Daytona Beach and Raftelis Financial Consultants, Inc. to conduct a solid waste rate study on behalf of the City of Ocala's Sanitation Division. This vendor has previously been used for the City of Ocala's most recent water rate study and our most recent stormwater rate study. In my research, I found a recent solid waste study Raftelis conducted for Lincoln, California. Lincoln's solid waste collection operation is similar to ours. The study mirrored how we envisioned our rate study would be structured, and what would be included. and was clearly and logically organized and presented.

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

[1015\\_Daytona Beach\\_General Services Contract 19632 and renewal to 3 3 2025.pdf](#)  
[RFP19632 Rate and Evaluation Consulting Services.pdf R\\_2020-60.pdf](#)  
[Solid Waste Rev Suff Agmt \(7-23-2024 \).docx](#)  
[Solid Waste Rev Suff\\_Scope of Services\\_6 2024 \(clean\).docx](#)

Department

(PWD) PUBLIC WORKS

Requestor Name

Darren Park

Requestor Email

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Phone number

(352) 351-6720

Courtesy Copy Email 1

[ddrake@ocalafl.gov](mailto:ddrake@ocalafl.gov)

Courtesy Copy Email 2

[dphillips@ocalafl.gov](mailto:dphillips@ocalafl.gov)

Who authorized requesting this exception?

Darren Park

