

## Dana Rawls

---

**From:** Lee Washington  
**Sent:** Wednesday, June 14, 2023 1:36 PM  
**To:** Jacob Erickson  
**Subject:** Secure HR

Dennis Cooley

[Bundled Pricing - Secure HR](#)

Respectfully,

Lee Washington  
County Administrator, Acting  
Manatee County Government  
1112 Manatee Ave W., 9<sup>th</sup> Floor  
Bradenton, FL 34205  
Mailing: P.O. Box 1000  
Bradenton, FL 34206-1000  
(941)748-4501 ext. 3648 Office  
(941)290-8337 Mobile  
(941)749-3040 Fax

## Dana Rawls

---

**From:** Lee Washington  
**Sent:** Friday, June 16, 2023 3:54 PM  
**To:** Jacob Erickson  
**Cc:** Sheila McLean  
**Subject:** RE: HR Assessment and Consulting Proposal Format

This is fine. Please move forward.

Respectfully,

Lee Washington  
County Administrator, Acting  
Manatee County Government  
1112 Manatee Ave W., 9<sup>th</sup> Floor  
Bradenton, FL 34205  
Mailing: P.O. Box 1000  
Bradenton, FL 34206-1000  
(941)748-4501 ext. 3648 Office  
(941)290-8337 Mobile  
(941)749-3040 Fax

---

**From:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Sent:** Thursday, June 15, 2023 3:51 PM  
**To:** Lee Washington <lee.washington@mymanatee.org>  
**Cc:** Sheila McLean <sheila.mclean@mymanatee.org>  
**Subject:** HR Assessment and Consulting Proposal Format

Good Afternoon Lee,

Hopefully you are having a great Thursday thus far and this email finds you well! Per the direction from the Board during the June 13<sup>th</sup> Work Session and as a follow up to our conversation yesterday, I put together the attached HR Assessment and Consulting Proposal Format to help Secure HR, LLC put together a proposal for the County to evaluate.

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Please let me know if you have any objection to this course of action as I am planning to send this to the company either tomorrow (June 16<sup>th</sup>) or Monday (June 19<sup>th</sup>). I will be working remotely tomorrow so if we need to discuss, please feel free to call me on my work cell phone (941-705-8955).

Thank you much, sir!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official

Manatee County Government  
941-748-4501 Ext. 3053



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**From:** Lee Washington  
**Sent:** Thursday, June 22, 2023 4:04 PM  
**To:** Jacob Erickson  
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Option 2, as the board seemed displeased with the previous consultant's resume.

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**From:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
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**To:** Lee Washington <lee.washington@mymanatee.org>  
**Cc:** Sheila McLean <sheila.mclean@mymanatee.org>  
**Subject:** RE: HR Assessment and Consulting Proposal Format

Good Afternoon Lee,

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Is the intention to build on and implement the changes recommended by the previous consultant?

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I will be working remotely tomorrow but can be reached via cell phone at 941-705-8955 if you'd like to discuss further.

Thank you very much in advance!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
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## Dana Rawls

---

**From:** Lee Washington  
**Sent:** Thursday, July 6, 2023 10:01 AM  
**To:** Amanda Ballard;Dana Summers;George Kruse;James Satcher;Jason Bearden;Jorge Arana;Joshua Emerick;Kelli OMalley;Kevin VanOstenbridge;Mike Rahn;Vanessa Baugh  
**Cc:** Courtney DePol;Charlie Bishop;William Clague  
**Subject:** HR Outsourcing

Commissioners,

We contacted Secure HR LLC shortly after the Work Session on 6/13 and provided them with the HR Assessment and Consulting Proposal Format on 6/19. We are still awaiting the completion of the application packet, which the owner stated we would have by the end of this week. Once we have the requested information, we will review the firm's qualifications (per Procurement regulations) and schedule the Sole-source meetings to bring them aboard.

As we make more progress, an update will be provided.

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## Dana Rawls

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**From:** Lee Washington  
**Sent:** Monday, July 24, 2023 7:50 AM  
**To:** Jacob Erickson  
**Subject:** RE: HR Assessment and Consulting Services Due Diligence of Response

\$150k for 2 months of work..., what am I missing? What's his scope that would justify these figures? What's next in this process?

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**From:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Sent:** Thursday, July 20, 2023 12:17 PM  
**To:** Lee Washington <lee.washington@mymanatee.org>; Courtney DePol <courtney.depol@mymanatee.org>; Charlie Bishop <charlie.bishop@mymanatee.org>; Sheila McLean <sheila.mclean@mymanatee.org>  
**Subject:** FW: HR Assessment and Consulting Services Due Diligence of Response  
**Importance:** High

Good Afternoon County Administration,

I am writing to inform you all that I received the outstanding documents from Secure HR, LLC. Their proposal is now in compliance with the form of proposal.

A revised Due Diligence memo and the remaining documents are hereby attached for your records.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
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2015 - 2023

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**From:** Jacob Erickson

**Sent:** Thursday, July 20, 2023 8:31 AM

**To:** Lee Washington <[lee.washington@mymanatee.org](mailto:lee.washington@mymanatee.org)>; Courtney DePol <[courtney.depol@mymanatee.org](mailto:courtney.depol@mymanatee.org)>; Charlie Bishop <[charlie.bishop@mymanatee.org](mailto:charlie.bishop@mymanatee.org)>; Sheila McLean <[sheila.mclean@mymanatee.org](mailto:sheila.mclean@mymanatee.org)>

**Subject:** HR Assessment and Consulting Services Due Diligence of Response

**Importance:** High

Good Morning Lee,

Hopefully you are having a great start to this Wednesday! Attached, you will find the following three documents for your review:

- HR Assessment and Consulting Services Due Diligence Memo.pdf
- Manatee County HR Proposal Response Final Draft.pdf
- HR Assessment and Consulting Proposal Response.pdf

It should be noted that Secure HR, LLC did not provide the filing indicating a Joint Venture or a statement indicating they are not a Joint Venture; a fully completed (signed and notarized) Exhibit 1 – Affidavit of No Conflict; and a completed W-9. Attached is the email I sent to the primary representative requesting these documents.

Once I receive the documents, I will revise the due diligence memo and send back for continuity.

Thank you very much!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
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**Sent:** Monday, July 24, 2023 4:15 PM  
**To:** Jacob Erickson  
**Cc:** Courtney DePol  
**Subject:** RE: HR Assessment and Consulting Services Due Diligence of Response

OK, Courtney and I will discuss and ensure we make ourselves available. Do not schedule w/o coordinating with myself or one of the deputies.

Respectfully,

Lee Washington  
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**Sent:** Monday, July 24, 2023 8:00 AM  
**To:** Lee Washington <lee.washington@mymanatee.org>  
**Subject:** Re: HR Assessment and Consulting Services Due Diligence of Response

Good Morning Sir,

I have the same concern especially since the payments are not tied to any deliverables. They are just due at the end of the consecutive months.

Sheila and I met with Courtney and Charlie B on Thursday of last week and I received direction to send Secure HR, LLC the previous HR consulting / assessment scope and have them modify it.

The next step would be to negotiate / further refine the scope and have Secure HR, LLC tie payments to specific deliverables. The previous assessment was \$60,000 initially so there is a large gap between these two figures.

In order to create further efficiencies, I believe it would be beneficial to set up a call with Secure HR, LLC to set expectations and start refining the scope. I will need someone from Administration on the call.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053

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**To:** Lee Washington  
**Cc:** Sheila McLean  
**Subject:** Re: HR Assessment and Consulting Proposal Format

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## Dana Rawls

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**From:** Courtney DePol  
**Sent:** Thursday, July 13, 2023 10:58 AM  
**To:** Jacob Erickson  
**Cc:** Lee Washington  
**Subject:** RE: Proposal Request Letter

Jake,

I would request that he return us the information by Friday July 21. BCC is back in session on 7/24 and it would be good to have something in hand in the event they request status. If that is not possible, let us know and we will relay that back to the Commissioners.

Very Respectfully,  
Courtney De Pol

[Courtney Z. De Pol, PE](#)  
Deputy County Administrator  
(941) 748-4501 x 3801 || Mobile: (941)718-7619  
[Courtney.DePol@mymanatee.org](mailto:Courtney.DePol@mymanatee.org)

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**From:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Sent:** Wednesday, July 12, 2023 4:15 PM  
**To:** Courtney DePol <[courtney.depol@mymanatee.org](mailto:courtney.depol@mymanatee.org)>  
**Subject:** Fwd: Proposal Request Letter

Hi Courtney,

In Lee's absence, please see the response below.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053

---

**From:** Dennis Cooley <[dennis.cooley@securehr.com](mailto:dennis.cooley@securehr.com)>  
**Sent:** Wednesday, July 12, 2023 4:10:43 PM  
**To:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Subject:** Re: Proposal Request Letter

**CAUTION: This email originated from an external source.  
Be suspicious of Attachments, Links and Request for Login Information and utilize the REPORT MESSAGE Button in Outlook if you feel this is a Phishing email.**

Jacob,

Thanks for following up. My goal is next Friday but it may be a the beginning of the following week. Will that be okay?

Thanks,

Dennis

iApprove this message

On Jul 12, 2023, at 3:57 PM, Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)> wrote:

Good Afternoon Dennis,

Hopefully you are having a great Wednesday thus far and this email finds you well! I just wanted to touch base and inquire as to whether or not you had a projected timeframe for sending the County Secure HR, LLC's proposal pertaining to the Human Resource Assessment and Consulting Services? Any information would be greatly appreciated.

Thank you!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
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941-748-4501 Ext. 3053  
<image001.png>  
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**To:** Lee Washington  
**Cc:** Sheila McLean  
**Subject:** Re: HR Assessment and Consulting Proposal Format

Very good. That was my takeaway as well but I just wanted to confirm.

Thank you!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
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**Sent:** Thursday, June 15, 2023 3:51 PM  
**To:** Lee Washington <[lee.washington@mymanatee.org](mailto:lee.washington@mymanatee.org)>  
**Cc:** Sheila McLean <[sheila.mclean@mymanatee.org](mailto:sheila.mclean@mymanatee.org)>  
**Subject:** HR Assessment and Consulting Proposal Format

Good Afternoon Lee,

Hopefully you are having a great Thursday thus far and this email finds you well! Per the direction from the Board during the June 13<sup>th</sup> Work Session and as a follow up to our conversation yesterday, I put together the attached HR Assessment and Consulting Proposal Format to help Secure HR, LLC put together a proposal for the County to evaluate.

The proposal structure is almost identical (if not, less than) what we ask for in our other Requests for Proposals. I've also attached Exhibit 2, Proposal Response Requirements – RFP No. 23-TA004673SB as an example to show that this is not an extraneous exercise and is standard practice based on the County's established policies and procedures.

Please let me know if you have any objection to this course of action as I am planning to send this to the company either tomorrow (June 16<sup>th</sup>) or Monday (June 19<sup>th</sup>). I will be working remotely tomorrow so if we need to discuss, please feel free to call me on my work cell phone (941-705-8955).

Thank you much, sir!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Thursday, June 22, 2023 4:02 PM  
**To:** Lee Washington  
**Cc:** Sheila McLean  
**Subject:** RE: HR Assessment and Consulting Proposal Format

Good Afternoon Lee,

Happy Thursday to you, sir! I received a question pertaining to the HR Assessment and Consulting Proposal and they are looking for direction so they can accurately complete the proposal.

Is the intention to build on and implement the changes recommended by the previous consultant?

Or

Is the intention for a proposer to come in, start with a clean slate and fully evaluate the current state of HR in order to propose a plan / vision for how the HR Department should function?

I will be working remotely tomorrow but can be reached via cell phone at 941-705-8955 if you'd like to discuss further.

Thank you very much in advance!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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2015 - 2022

---

**From:** Lee Washington <lee.washington@mymanatee.org>  
**Sent:** Friday, June 16, 2023 3:54 PM  
**To:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Cc:** Sheila McLean <sheila.mclean@mymanatee.org>  
**Subject:** RE: HR Assessment and Consulting Proposal Format

This is fine. Please move forward.

Respectfully,

Lee Washington  
County Administrator, Acting  
Manatee County Government  
1112 Manatee Ave W., 9<sup>th</sup> Floor  
Bradenton, FL 34205  
Mailing: P.O. Box 1000  
Bradenton, FL 34206-1000  
(941)748-4501 ext. 3648 Office  
(941)290-8337 Mobile  
(941)749-3040 Fax

---

**From:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Sent:** Thursday, June 15, 2023 3:51 PM  
**To:** Lee Washington <[lee.washington@mymanatee.org](mailto:lee.washington@mymanatee.org)>  
**Cc:** Sheila McLean <[sheila.mclean@mymanatee.org](mailto:sheila.mclean@mymanatee.org)>  
**Subject:** HR Assessment and Consulting Proposal Format

Good Afternoon Lee,

Hopefully you are having a great Thursday thus far and this email finds you well! Per the direction from the Board during the June 13<sup>th</sup> Work Session and as a follow up to our conversation yesterday, I put together the attached HR Assessment and Consulting Proposal Format to help Secure HR, LLC put together a proposal for the County to evaluate.

The proposal structure is almost identical (if not, less than) what we ask for in our other Requests for Proposals. I've also attached Exhibit 2, Proposal Response Requirements – RFP No. 23-TA004673SB as an example to show that this is not an extraneous exercise and is standard practice based on the County's established policies and procedures.

Please let me know if you have any objection to this course of action as I am planning to send this to the company either tomorrow (June 16<sup>th</sup>) or Monday (June 19<sup>th</sup>). I will be working remotely tomorrow so if we need to discuss, please feel free to call me on my work cell phone (941-705-8955).

Thank you much, sir!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Thursday, July 13, 2023 11:04 AM  
**To:** Courtney DePol  
**Cc:** Lee Washington  
**Subject:** RE: Proposal Request Letter

Hi Courtney,

Understood. I will reach out to him and relay the message.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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---

**From:** Courtney DePol <courtney.depol@mymanatee.org>  
**Sent:** Thursday, July 13, 2023 10:58 AM  
**To:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Cc:** Lee Washington <lee.washington@mymanatee.org>  
**Subject:** RE: Proposal Request Letter

Jake,

I would request that he return us the information by Friday July 21. BCC is back in session on 7/24 and it would be good to have something in hand in the event they request status. If that is not possible, let us know and we will relay that back to the Commissioners.

Very Respectfully,  
Courtney De Pol

**Courtney Z. De Pol, PE**  
Deputy County Administrator  
(941) 748-4501 x 3801 || Mobile: (941)718-7619  
[Courtney.DePol@mymanatee.org](mailto:Courtney.DePol@mymanatee.org)

---

**From:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Sent:** Wednesday, July 12, 2023 4:15 PM

**To:** Courtney DePol <[courtney.depol@mymanatee.org](mailto:courtney.depol@mymanatee.org)>

**Subject:** Fwd: Proposal Request Letter

Hi Courtney,

In Lee's absence, please see the response below.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053

---

**From:** Dennis Cooley <[dennis.cooley@securehr.com](mailto:dennis.cooley@securehr.com)>  
**Sent:** Wednesday, July 12, 2023 4:10:43 PM  
**To:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Subject:** Re: Proposal Request Letter

**CAUTION:**This email originated from an external source.  
Be suspicious of Attachments, Links and Request for Login Information and utilize the REPORT MESSAGE Button in Outlook if you feel this is a Phishing email.

Jacob,

Thanks for following up. My goal is next Friday but it may be a the beginning of the following week. Will that be okay?

Thanks,  
Dennis

iApprove this message

On Jul 12, 2023, at 3:57 PM, Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)> wrote:

Good Afternoon Dennis,

Hopefully you are having a great Wednesday thus far and this email finds you well! I just wanted to touch base and inquire as to whether or not you had a projected timeframe for sending the County Secure HR, LLC's proposal pertaining to the Human Resource Assessment and Consulting Services? Any information would be greatly appreciated.

Thank you!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053  
<image001.png>  
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2015 - 2022

## Dana Rawls

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**From:** Jacob Erickson  
**Sent:** Wednesday, July 19, 2023 4:44 PM  
**To:** Lee Washington; Courtney DePol; Charlie Bishop; Sheila McLean  
**Subject:** HR Assessment

Good Afternoon Lee, Courtney, Charlie and Sheila,

I am writing to let you know that I received Secure HR, LLC's proposal for the HR Assessment project. I will be conducting due diligence on the response and provide my findings based on the requested form of proposal and the proposal itself tomorrow morning.

Just wanted to keep you all in the loop. Thank you much!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



## Dana Rawls

---

**From:** Sheila McLean  
**Sent:** Wednesday, July 19, 2023 4:54 PM  
**To:** Jacob Erickson;Lee Washington;Courtney DePol;Charlie Bishop  
**Subject:** Re: HR Assessment

Thank you Jake

Get [Outlook for iOS](#)

---

**From:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Sent:** Wednesday, July 19, 2023 4:44:29 PM  
**To:** Lee Washington <lee.washington@mymanatee.org>; Courtney DePol <courtney.depol@mymanatee.org>; Charlie Bishop <charlie.bishop@mymanatee.org>; Sheila McLean <sheila.mclean@mymanatee.org>  
**Subject:** HR Assessment

Good Afternoon Lee, Courtney, Charlie and Sheila,

I am writing to let you know that I received Secure HR, LLC's proposal for the HR Assessment project. I will be conducting due diligence on the response and provide my findings based on the requested form of proposal and the proposal itself tomorrow morning.

Just wanted to keep you all in the loop. Thank you much!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053

## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Thursday, July 20, 2023 8:31 AM  
**To:** Lee Washington; Courtney DePol; Charlie Bishop; Sheila McLean  
**Subject:** HR Assessment and Consulting Services Due Diligence of Response  
**Attachments:** HR Assessment and Consulting Services Due Diligence Memo.pdf; Manatee County HR Proposal Response Final Draft.pdf; HR Assessment and Consulting Proposal Response.pdf; RE: Secure RFP for HR Services

Good Morning Lee,

Hopefully you are having a great start to this Wednesday! Attached, you will find the following three documents for your review:

- HR Assessment and Consulting Services Due Diligence Memo.pdf
- Manatee County HR Proposal Response Final Draft.pdf
- HR Assessment and Consulting Proposal Response.pdf

It should be noted that Secure HR, LLC did not provide the filing indicating a Joint Venture or a statement indicating they are not a Joint Venture; a fully completed (signed and notarized) Exhibit 1 – Affidavit of No Conflict; and a completed W-9. Attached is the email I sent to the primary representative requesting these documents.

Once I receive the documents, I will revise the due diligence memo and send back for continuity.

Thank you very much!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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2015 - 2023

## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Thursday, July 20, 2023 12:17 PM  
**To:** Lee Washington; Courtney DePol; Charlie Bishop; Sheila McLean  
**Subject:** FW: HR Assessment and Consulting Services Due Diligence of Response  
**Attachments:** Revised HR Assessment and Consulting Services Due Diligence Memo.pdf; SHR Not A Joint Venture Notice.pdf; SHR Conflict of Interest Affidavit.pdf; SHR W9.pdf

Good Afternoon County Administration,

I am writing to inform you all that I received the outstanding documents from Secure HR, LLC. Their proposal is now in compliance with the form of proposal.

A revised Due Diligence memo and the remaining documents are hereby attached for your records.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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2015 - 2023

---

**From:** Jacob Erickson  
**Sent:** Thursday, July 20, 2023 8:31 AM  
**To:** Lee Washington <lee.washington@mymanatee.org>; Courtney DePol <courtney.depol@mymanatee.org>; Charlie Bishop <charlie.bishop@mymanatee.org>; Sheila McLean <sheila.mclean@mymanatee.org>  
**Subject:** HR Assessment and Consulting Services Due Diligence of Response  
**Importance:** High

Good Morning Lee,

Hopefully you are having a great start to this Wednesday! Attached, you will find the following three documents for your review:

- HR Assessment and Consulting Services Due Diligence Memo.pdf
- Manatee County HR Proposal Response Final Draft.pdf
- HR Assessment and Consulting Proposal Response.pdf

It should be noted that Secure HR, LLC did not provide the filing indicating a Joint Venture or a statement indicating they are not a Joint Venture; a fully completed (signed and notarized) Exhibit 1 – Affidavit of No

Conflict; and a completed W-9. Attached is the email I sent to the primary representative requesting these documents.

Once I receive the documents, I will revise the due diligence memo and send back for continuity.

Thank you very much!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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2015 - 2023

## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Monday, July 24, 2023 4:17 PM  
**To:** Lee Washington  
**Cc:** Courtney DePol  
**Subject:** Re: HR Assessment and Consulting Services Due Diligence of Response

Hi Lee,

Understood and yes sir. Thank you!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053

---

**From:** Lee Washington <lee.washington@mymanatee.org>  
**Sent:** Monday, July 24, 2023 4:14:44 PM  
**To:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Cc:** Courtney DePol <courtney.depol@mymanatee.org>  
**Subject:** RE: HR Assessment and Consulting Services Due Diligence of Response

OK, Courtney and I will discuss and ensure we make ourselves available. Do not schedule w/o coordinating with myself or one of the deputies.

Respectfully,

Lee Washington  
County Administrator, Acting  
Manatee County Government  
1112 Manatee Ave W., 9<sup>th</sup> Floor  
Bradenton, FL 34205  
Mailing: P.O. Box 1000  
Bradenton, FL 34206-1000  
(941)748-4501 ext. 3648 Office  
(941)290-8337 Mobile  
(941)749-3040 Fax

---

**From:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Sent:** Monday, July 24, 2023 8:00 AM  
**To:** Lee Washington <lee.washington@mymanatee.org>  
**Subject:** Re: HR Assessment and Consulting Services Due Diligence of Response

Good Morning Sir,

I have the same concern especially since the payments are not tied to any deliverables. They are just due at the end of the consecutive months.

Sheila and I met with Courtney and Charlie B on Thursday of last week and I received direction to send Secure HR, LLC the previous HR consulting / assessment scope and have them modify it.

The next step would be to negotiate / further refine the scope and have Secure HR, LLC tie payments to specific deliverables. The previous assessment was \$60,000 initially so there is a large gap between these two figures.

In order to create further efficiencies, I believe it would be beneficial to set up a call with Secure HR, LLC to set expectations and start refining the scope. I will need someone from Administration on the call.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053

---

**From:** Lee Washington <[lee.washington@mymanatee.org](mailto:lee.washington@mymanatee.org)>  
**Sent:** Monday, July 24, 2023 7:49 AM  
**To:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Subject:** RE: HR Assessment and Consulting Services Due Diligence of Response

\$150k for 2 months of work..., what am I missing? What's his scope that would justify these figures? What's next in this process?

Respectfully,

Lee Washington  
County Administrator, Acting  
Manatee County Government  
1112 Manatee Ave W., 9<sup>th</sup> Floor  
Bradenton, FL 34205  
Mailing: P.O. Box 1000  
Bradenton, FL 34206-1000  
(941)748-4501 ext. 3648 Office  
(941)290-8337 Mobile  
(941)749-3040 Fax

---

**From:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Sent:** Thursday, July 20, 2023 12:17 PM  
**To:** Lee Washington <[lee.washington@mymanatee.org](mailto:lee.washington@mymanatee.org)>; Courtney DePol <[courtney.depol@mymanatee.org](mailto:courtney.depol@mymanatee.org)>; Charlie Bishop <[charlie.bishop@mymanatee.org](mailto:charlie.bishop@mymanatee.org)>; Sheila McLean <[sheila.mclean@mymanatee.org](mailto:sheila.mclean@mymanatee.org)>  
**Subject:** FW: HR Assessment and Consulting Services Due Diligence of Response  
**Importance:** High

Good Afternoon County Administration,

I am writing to inform you all that I received the outstanding documents from Secure HR, LLC. Their proposal is now in compliance with the form of proposal.

A revised Due Diligence memo and the remaining documents are hereby attached for your records.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government



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FAPPO *Award for Excellence in Public Procurement*  
2015 - 2023

---

**From:** Jacob Erickson

**Sent:** Thursday, July 20, 2023 8:31 AM

**To:** Lee Washington <[lee.washington@mymanatee.org](mailto:lee.washington@mymanatee.org)>; Courtney DePol <[courtney.depol@mymanatee.org](mailto:courtney.depol@mymanatee.org)>; Charlie Bishop <[charlie.bishop@mymanatee.org](mailto:charlie.bishop@mymanatee.org)>; Sheila McLean <[sheila.mclean@mymanatee.org](mailto:sheila.mclean@mymanatee.org)>

**Subject:** HR Assessment and Consulting Services Due Diligence of Response

**Importance:** High

Good Morning Lee,

Hopefully you are having a great start to this Wednesday! Attached, you will find the following three documents for your review:

- HR Assessment and Consulting Services Due Diligence Memo.pdf
- Manatee County HR Proposal Response Final Draft.pdf
- HR Assessment and Consulting Proposal Response.pdf

It should be noted that Secure HR, LLC did not provide the filing indicating a Joint Venture or a statement indicating they are not a Joint Venture; a fully completed (signed and notarized) Exhibit 1 – Affidavit of No Conflict; and a completed W-9. Attached is the email I sent to the primary representative requesting these documents.

Once I receive the documents, I will revise the due diligence memo and send back for continuity.

Thank you very much!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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## Dana Rawls

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**From:** Courtney DePol  
**Sent:** Wednesday, July 26, 2023 5:09 PM  
**Cc:** Charlie Bishop;Lee Washington;William Clague;Jacob Erickson;Sheila McLean  
**Subject:** HR Consultant Update

Good evening Commissioners,

I wanted to provide a quick update on outsourcing Human Resources. We are expecting to have updated scope and pricing back next Monday, 7/31, and will provide another update to the Board as soon as it is evaluated.

**Background:** Per Board direction, Procurement has been in discussion with a local company, Secure HR, to look into privatizing Human Resources. Secure HR provided an initial proposal on 7/19 to perform Phase 1, an Audit of HR, in the amount of \$150,000. This estimate was based on having 4 employees conduct the audit, taking an expected 1500 hours at their billable rate of \$400/hr (\$100/hr/auditor auditor).

**Way Ahead:** Due to the limited information provided on 7/19, we requested Secure HR to further refine their scope of services and identify specific deliverables tied to each of the payments over the 2-month performance period. We have requested the revised scope and pricing by Monday, 7/31. Once proposal pricing is finalized, we are required to post a "Notice of Intent to Award" for 5 business days. If no additional proposals are received, we will be able to bring the negotiated proposal to the Board for final approval. If we do receive other proposals, we will be required to review those prior to bringing to the Board.

More to follow after we hear from Secure HR next week. If you have any questions, please do not hesitate to contact me.

Very Respectfully,

Courtney De Pol, PE  
Deputy County Administrator  
**Manatee County Government**  
1112 Manatee Avenue West, 9<sup>th</sup> Floor  
Bradenton, FL 34205  
941-748-4501 x 3801  
Mobile: 941-718-7619



## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Friday, July 28, 2023 2:29 PM  
**To:** Lee Washington; Courtney DePol; Charlie Bishop  
**Subject:** FW: HR Assessment Scope Development  
**Attachments:** Manatee County Government Human Resources Assessment Final Draft.pdf

Good Afternoon Lee, Courtney, and Charlie,

Happy Friday to you all! Please see the revised HR Assessment and Consulting Services proposal attached for your review. Would Administration still like to have a call with Secure HR, LLC to discuss the revised scope of services?

I have the Notice of Intent to Award already prepared so once I get have Admin approval, I can post and start drafting the agreement.

Thank you much!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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**From:** Dennis Cooley <dennis.cooley@securehr.com>  
**Sent:** Friday, July 28, 2023 2:06 PM  
**To:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Subject:** Re: HR Assessment Scope Development

**CAUTION: This email originated from an external source.**  
**Be suspicious of Attachments, Links and Request for Login Information and utilize the REPORT MESSAGE Button in Outlook if you feel this is a Phishing email.**

Jacob,

Hope your week is ending well! Attached is our response to the refined scope for the HR assessment. If I have missed anything or you have any questions, please let me know. We sincerely appreciate the opportunity to be part of this process.

Thanks,

Dennis Cooley  
President  
Secure HR  
[www.securehr.com](http://www.securehr.com)

On Tue, Jul 25, 2023 at 10:35 AM Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)> wrote:

Excellent! Much appreciated sir!

Jacob Erickson, MBA, CPPO, NIGP-CPP

Purchasing Official

Manatee County Government

941-748-4501 Ext. 3053



**Manatee County Procurement Division**

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*FAPPO Award for Excellence in Public Procurement*

2015 - 2023

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**From:** Dennis Cooley <[dennis.cooley@securehr.com](mailto:dennis.cooley@securehr.com)>  
**Sent:** Tuesday, July 25, 2023 10:29 AM  
**To:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Subject:** Re: HR Assessment Scope Development

**CAUTION: This email originated from an external source.  
Be suspicious of Attachments, Links and Request for Login Information and utilize the REPORT MESSAGE Button in Outlook if you feel this is a Phishing email.**

Jacob,

All is well here and hope you are too! I'll review the attached and get back to you by Monday.

Thanks,

Dennis Cooley

President

Secure HR

[www.securehr.com](http://www.securehr.com)

On Tue, Jul 25, 2023 at 9:26 AM Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)> wrote:

Good Morning Dennis,

Hopefully you are having a great Tuesday thus far and this email finds you well! Upon review of Secure HR, LLC's proposal, the County would like Secure HR, LLC to further refine their scope of services and identify specific deliverables to tie to payments. Attached is a proposed scope of services for an HR Assessment. The County is requesting Secure HR, LLC revise this scope to adapt to Secure HR, LLC's envisioned project approach.

The County asks that Secure HR, LLC return the revised scope and pricing no later than Monday (July 31<sup>st</sup>). After receiving and reviewing the revised scope and pricing, the County intends to set up a call with Secure HR, LLC to further discuss any revisions.

Thank you!

Jacob Erickson, MBA, CPPO, NIGP-CPP

Purchasing Official

Manatee County Government

941-748-4501 Ext. 3053



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*FAPPO Award for Excellence in Public Procurement*

2015 - 2023

## Dana Rawls

---

**From:** Courtney DePol  
**Sent:** Wednesday, August 2, 2023 5:05 PM  
**Cc:** Charlie Bishop;Lee Washington;William Clague;Jacob Erickson;Sheila McLean  
**Subject:** RE: HR Consultant Update

Good evening Commissioners,

We received an updated scope and pricing back from Secure HR. Staff is recommending an abbreviated HR assessment in the amount of **\$18,750**, which will take roughly 125 hours of review, taking place over the course of approximately 3 weeks. We plan to bring the contract forward to the Board for approval on August 22<sup>nd</sup>.

**Background:** Per Board direction, Procurement has been in discussion with a local company, Secure HR, to look into privatizing Human Resources. Secure HR provided an initial proposal on 7/19 to perform Phase 1, an Audit of HR, in the amount of \$150,000. This estimate was based on having 4 employees conduct the audit, taking an expected 1500 hours at their billable rate of \$400/hr (\$100/hr/auditor auditor). Due to the high cost, we reached out to Secure HR to provide more details on what the County was looking for and in turn, to re-evaluate their price.

The response we received from Secure HR is below. We do feel as though an abbreviated assessment, rather than a full HR audit, will provide you with the resources you need to make an informed decision on the most appropriate next steps.

**Secure HR Response:**

Generally, a full HR Audit, which involves a comprehensive review of all HR practices, policies, and compliance measures within an organization, can take several weeks to several months to complete depending on the size of the organization. On the other hand, an HR assessment, which is a more focused evaluation of specific HR functions or areas, can typically be completed within a few days to a few weeks, also dependent on the size of the organization. Oftentimes, an HR assessment can be conducted with a smaller team than a full HR audit. Based on the scope provided in the first RFP, we proposed a comprehensive HR audit which was estimated to take close to 1500 hours. However, after receiving clarification on the scope of needs, we believe an HR assessment will meet those needs resulting in much less time and resources required while still providing meaningful results and insight.

**Way Ahead:** Late this week or early next, Procurement will post a "Notice of Intent to Award" for 5 business days. If no additional proposals are received, we will be able to bring the negotiated proposal to the Board for final approval on August 22<sup>nd</sup>. If we do receive other proposals, we will be required to review those prior to bringing to the Board.

If you have any questions or concerns, please do not hesitate to contact me.

Very Respectfully,  
Courtney De Pol

[Courtney Z. De Pol, PE](#)

Deputy County Administrator

(941) 748-4501 x 3801 || Mobile: (941)718-7619

[Courtney.DePol@mymanatee.org](mailto:Courtney.DePol@mymanatee.org)

---

**From:** Courtney DePol

**Sent:** Wednesday, July 26, 2023 5:09 PM

**Cc:** Charlie Bishop <charlie.bishop@mymanatee.org>; Lee Washington <lee.washington@mymanatee.org>; William

Clague <william.clague@mymanatee.org>; Jacob Erickson <Jacob.Erickson@mymanatee.org>; Sheila McLean <sheila.mclean@mymanatee.org>

**Subject:** HR Consultant Update

Good evening Commissioners,

I wanted to provide a quick update on outsourcing Human Resources. We are expecting to have updated scope and pricing back next Monday, 7/31, and will provide another update to the Board as soon as it is evaluated.

**Background:** Per Board direction, Procurement has been in discussion with a local company, Secure HR, to look into privatizing Human Resources. Secure HR provided an initial proposal on 7/19 to perform Phase 1, an Audit of HR, in the amount of \$150,000. This estimate was based on having 4 employees conduct the audit, taking an expected 1500 hours at their billable rate of \$400/hr (\$100/hr/auditor auditor).

**Way Ahead:** Due to the limited information provided on 7/19, we requested Secure HR to further refine their scope of services and identify specific deliverables tied to each of the payments over the 2-month performance period. We have requested the revised scope and pricing by Monday, 7/31. Once proposal pricing is finalized, we are required to post a "Notice of Intent to Award" for 5 business days. If no additional proposals are received, we will be able to bring the negotiated proposal to the Board for final approval. If we do receive other proposals, we will be required to review those prior to bringing to the Board.

More to follow after we hear from Secure HR next week. If you have any questions, please do not hesitate to contact me.

Very Respectfully,

**Courtney De Pol, PE**

Deputy County Administrator

**Manatee County Government**

1112 Manatee Avenue West, 9<sup>th</sup> Floor

Bradenton, FL 34205

941-748-4501 x 3801

Mobile: 941-718-7619



## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Thursday, June 15, 2023 3:51 PM  
**To:** Lee Washington  
**Cc:** Sheila McLean  
**Subject:** HR Assessment and Consulting Proposal Format  
**Attachments:** HR Assessment and Consulting Proposal Format.pdf; Exhibit 2, Proposal Response Requirements - RFP No. 23-TA004673SB.pdf

Good Afternoon Lee,

Hopefully you are having a great Thursday thus far and this email finds you well! Per the direction from the Board during the June 13<sup>th</sup> Work Session and as a follow up to our conversation yesterday, I put together the attached HR Assessment and Consulting Proposal Format to help Secure HR, LLC put together a proposal for the County to evaluate.

The proposal structure is almost identical (if not, less than) what we ask for in our other Requests for Proposals. I've also attached Exhibit 2, Proposal Response Requirements – RFP No. 23-TA004673SB as an example to show that this is not an extraneous exercise and is standard practice based on the County's established policies and procedures.

Please let me know if you have any objection to this course of action as I am planning to send this to the company either tomorrow (June 16<sup>th</sup>) or Monday (June 19<sup>th</sup>). I will be working remotely tomorrow so if we need to discuss, please feel free to call me on my work cell phone (941-705-8955).

Thank you much, sir!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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FAPPO *Award for Excellence in Public Procurement*  
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## Dana Rawls

---

**From:** Courtney DePol  
**Sent:** Wednesday, August 2, 2023 5:05 PM  
**Cc:** Charlie Bishop;Lee Washington;William Clague;Jacob Erickson;Sheila McLean  
**Subject:** RE: HR Consultant Update

Good evening Commissioners,

We received an updated scope and pricing back from Secure HR. Staff is recommending an abbreviated HR assessment in the amount of **\$18,750**, which will take roughly 125 hours of review, taking place over the course of approximately 3 weeks. We plan to bring the contract forward to the Board for approval on August 22<sup>nd</sup>.

**Background:** Per Board direction, Procurement has been in discussion with a local company, Secure HR, to look into privatizing Human Resources. Secure HR provided an initial proposal on 7/19 to perform Phase 1, an Audit of HR, in the amount of \$150,000. This estimate was based on having 4 employees conduct the audit, taking an expected 1500 hours at their billable rate of \$400/hr (\$100/hr/auditor auditor). Due to the high cost, we reached out to Secure HR to provide more details on what the County was looking for and in turn, to re-evaluate their price.

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If you have any questions or concerns, please do not hesitate to contact me.

Very Respectfully,  
Courtney De Pol

[Courtney Z. De Pol, PE](#)

Deputy County Administrator  
(941) 748-4501 x 3801 || Mobile: (941)718-7619  
[Courtney.DePol@mymanatee.org](mailto:Courtney.DePol@mymanatee.org)

---

**From:** Courtney DePol  
**Sent:** Wednesday, July 26, 2023 5:09 PM  
**Cc:** Charlie Bishop <charlie.bishop@mymanatee.org>; Lee Washington <lee.washington@mymanatee.org>; William

Clague <william.clague@mymanatee.org>; Jacob Erickson <Jacob.Erickson@mymanatee.org>; Sheila McLean <sheila.mclean@mymanatee.org>

**Subject:** HR Consultant Update

Good evening Commissioners,

I wanted to provide a quick update on outsourcing Human Resources. We are expecting to have updated scope and pricing back next Monday, 7/31, and will provide another update to the Board as soon as it is evaluated.

**Background:** Per Board direction, Procurement has been in discussion with a local company, Secure HR, to look into privatizing Human Resources. Secure HR provided an initial proposal on 7/19 to perform Phase 1, an Audit of HR, in the amount of \$150,000. This estimate was based on having 4 employees conduct the audit, taking an expected 1500 hours at their billable rate of \$400/hr (\$100/hr/auditor auditor).

**Way Ahead:** Due to the limited information provided on 7/19, we requested Secure HR to further refine their scope of services and identify specific deliverables tied to each of the payments over the 2-month performance period. We have requested the revised scope and pricing by Monday, 7/31. Once proposal pricing is finalized, we are required to post a "Notice of Intent to Award" for 5 business days. If no additional proposals are received, we will be able to bring the negotiated proposal to the Board for final approval. If we do receive other proposals, we will be required to review those prior to bringing to the Board.

More to follow after we hear from Secure HR next week. If you have any questions, please do not hesitate to contact me.

Very Respectfully,

**Courtney De Pol, PE**

Deputy County Administrator

**Manatee County Government**

1112 Manatee Avenue West, 9<sup>th</sup> Floor

Bradenton, FL 34205

941-748-4501 x 3801

Mobile: 941-718-7619



## Dana Rawls

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**From:** Jacob Erickson  
**Sent:** Friday, July 28, 2023 2:29 PM  
**To:** Lee Washington; Courtney DePol; Charlie Bishop  
**Subject:** FW: HR Assessment Scope Development  
**Attachments:** Manatee County Government Human Resources Assessment Final Draft.pdf

Good Afternoon Lee, Courtney, and Charlie,

Happy Friday to you all! Please see the revised HR Assessment and Consulting Services proposal attached for your review. Would Administration still like to have a call with Secure HR, LLC to discuss the revised scope of services?

I have the Notice of Intent to Award already prepared so once I get have Admin approval, I can post and start drafting the agreement.

Thank you much!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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**From:** Dennis Cooley <dennis.cooley@securehr.com>  
**Sent:** Friday, July 28, 2023 2:06 PM  
**To:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Subject:** Re: HR Assessment Scope Development

**CAUTION: This email originated from an external source.**  
**Be suspicious of Attachments, Links and Request for Login Information and utilize the REPORT MESSAGE Button in Outlook if you feel this is a Phishing email.**

Jacob,

Hope your week is ending well! Attached is our response to the refined scope for the HR assessment. If I have missed anything or you have any questions, please let me know. We sincerely appreciate the opportunity to be part of this process.

Thanks,

Dennis Cooley  
President  
Secure HR  
[www.securehr.com](http://www.securehr.com)

On Tue, Jul 25, 2023 at 10:35 AM Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)> wrote:

Excellent! Much appreciated sir!

Jacob Erickson, MBA, CPPO, NIGP-CPP

Purchasing Official

Manatee County Government

941-748-4501 Ext. 3053



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2015 - 2023

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**From:** Dennis Cooley <[dennis.cooley@securehr.com](mailto:dennis.cooley@securehr.com)>  
**Sent:** Tuesday, July 25, 2023 10:29 AM  
**To:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Subject:** Re: HR Assessment Scope Development

**CAUTION: This email originated from an external source.  
Be suspicious of Attachments, Links and Request for Login Information and utilize the REPORT MESSAGE Button in Outlook if you feel this is a Phishing email.**

Jacob,

All is well here and hope you are too! I'll review the attached and get back to you by Monday.

Thanks,

Dennis Cooley

President

Secure HR

[www.securehr.com](http://www.securehr.com)

On Tue, Jul 25, 2023 at 9:26 AM Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)> wrote:

Good Morning Dennis,

Hopefully you are having a great Tuesday thus far and this email finds you well! Upon review of Secure HR, LLC's proposal, the County would like Secure HR, LLC to further refine their scope of services and identify specific deliverables to tie to payments. Attached is a proposed scope of services for an HR Assessment. The County is requesting Secure HR, LLC revise this scope to adapt to Secure HR, LLC's envisioned project approach.

The County asks that Secure HR, LLC return the revised scope and pricing no later than Monday (July 31<sup>st</sup>). After receiving and reviewing the revised scope and pricing, the County intends to set up a call with Secure HR, LLC to further discuss any revisions.

Thank you!

Jacob Erickson, MBA, CPPO, NIGP-CPP

Purchasing Official

Manatee County Government

941-748-4501 Ext. 3053



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## Dana Rawls

---

**From:** Courtney DePol  
**Sent:** Wednesday, July 26, 2023 5:09 PM  
**Cc:** Charlie Bishop;Lee Washington;William Clague;Jacob Erickson;Sheila McLean  
**Subject:** HR Consultant Update

Good evening Commissioners,

I wanted to provide a quick update on outsourcing Human Resources. We are expecting to have updated scope and pricing back next Monday, 7/31, and will provide another update to the Board as soon as it is evaluated.

**Background:** Per Board direction, Procurement has been in discussion with a local company, Secure HR, to look into privatizing Human Resources. Secure HR provided an initial proposal on 7/19 to perform Phase 1, an Audit of HR, in the amount of \$150,000. This estimate was based on having 4 employees conduct the audit, taking an expected 1500 hours at their billable rate of \$400/hr (\$100/hr/auditor auditor).

**Way Ahead:** Due to the limited information provided on 7/19, we requested Secure HR to further refine their scope of services and identify specific deliverables tied to each of the payments over the 2-month performance period. We have requested the revised scope and pricing by Monday, 7/31. Once proposal pricing is finalized, we are required to post a "Notice of Intent to Award" for 5 business days. If no additional proposals are received, we will be able to bring the negotiated proposal to the Board for final approval. If we do receive other proposals, we will be required to review those prior to bringing to the Board.

More to follow after we hear from Secure HR next week. If you have any questions, please do not hesitate to contact me.

Very Respectfully,

Courtney De Pol, PE  
Deputy County Administrator  
**Manatee County Government**  
1112 Manatee Avenue West, 9<sup>th</sup> Floor  
Bradenton, FL 34205  
941-748-4501 x 3801  
Mobile: 941-718-7619



## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Monday, July 24, 2023 4:17 PM  
**To:** Lee Washington  
**Cc:** Courtney DePol  
**Subject:** Re: HR Assessment and Consulting Services Due Diligence of Response

Hi Lee,

Understood and yes sir. Thank you!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053

---

**From:** Lee Washington <lee.washington@mymanatee.org>  
**Sent:** Monday, July 24, 2023 4:14:44 PM  
**To:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Cc:** Courtney DePol <courtney.depol@mymanatee.org>  
**Subject:** RE: HR Assessment and Consulting Services Due Diligence of Response

OK, Courtney and I will discuss and ensure we make ourselves available. Do not schedule w/o coordinating with myself or one of the deputies.

Respectfully,

Lee Washington  
County Administrator, Acting  
Manatee County Government  
1112 Manatee Ave W., 9<sup>th</sup> Floor  
Bradenton, FL 34205  
Mailing: P.O. Box 1000  
Bradenton, FL 34206-1000  
(941)748-4501 ext. 3648 Office  
(941)290-8337 Mobile  
(941)749-3040 Fax

---

**From:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Sent:** Monday, July 24, 2023 8:00 AM  
**To:** Lee Washington <lee.washington@mymanatee.org>  
**Subject:** Re: HR Assessment and Consulting Services Due Diligence of Response

Good Morning Sir,

I have the same concern especially since the payments are not tied to any deliverables. They are just due at the end of the consecutive months.



Sheila and I met with Courtney and Charlie B on Thursday of last week and I received direction to send Secure HR, LLC the previous HR consulting / assessment scope and have them modify it.

The next step would be to negotiate / further refine the scope and have Secure HR, LLC tie payments to specific deliverables. The previous assessment was \$60,000 initially so there is a large gap between these two figures.

In order to create further efficiencies, I believe it would be beneficial to set up a call with Secure HR, LLC to set expectations and start refining the scope. I will need someone from Administration on the call.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053

---

**From:** Lee Washington <[lee.washington@mymanatee.org](mailto:lee.washington@mymanatee.org)>  
**Sent:** Monday, July 24, 2023 7:49 AM  
**To:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Subject:** RE: HR Assessment and Consulting Services Due Diligence of Response

\$150k for 2 months of work..., what am I missing? What's his scope that would justify these figures? What's next in this process?

Respectfully,

Lee Washington  
County Administrator, Acting  
Manatee County Government  
1112 Manatee Ave W., 9<sup>th</sup> Floor  
Bradenton, FL 34205  
Mailing: P.O. Box 1000  
Bradenton, FL 34206-1000  
(941)748-4501 ext. 3648 Office  
(941)290-8337 Mobile  
(941)749-3040 Fax

---

**From:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Sent:** Thursday, July 20, 2023 12:17 PM  
**To:** Lee Washington <[lee.washington@mymanatee.org](mailto:lee.washington@mymanatee.org)>; Courtney DePol <[courtney.depol@mymanatee.org](mailto:courtney.depol@mymanatee.org)>; Charlie Bishop <[charlie.bishop@mymanatee.org](mailto:charlie.bishop@mymanatee.org)>; Sheila McLean <[sheila.mclean@mymanatee.org](mailto:sheila.mclean@mymanatee.org)>  
**Subject:** FW: HR Assessment and Consulting Services Due Diligence of Response  
**Importance:** High

Good Afternoon County Administration,

I am writing to inform you all that I received the outstanding documents from Secure HR, LLC. Their proposal is now in compliance with the form of proposal.

A revised Due Diligence memo and the remaining documents are hereby attached for your records.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government

941-748-4501 Ext. 3053



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---

**From:** Jacob Erickson

**Sent:** Thursday, July 20, 2023 8:31 AM

**To:** Lee Washington <[lee.washington@mymanatee.org](mailto:lee.washington@mymanatee.org)>; Courtney DePol <[courtney.depol@mymanatee.org](mailto:courtney.depol@mymanatee.org)>; Charlie Bishop <[charlie.bishop@mymanatee.org](mailto:charlie.bishop@mymanatee.org)>; Sheila McLean <[sheila.mclean@mymanatee.org](mailto:sheila.mclean@mymanatee.org)>

**Subject:** HR Assessment and Consulting Services Due Diligence of Response

**Importance:** High

Good Morning Lee,

Hopefully you are having a great start to this Wednesday! Attached, you will find the following three documents for your review:

- HR Assessment and Consulting Services Due Diligence Memo.pdf
- Manatee County HR Proposal Response Final Draft.pdf
- HR Assessment and Consulting Proposal Response.pdf

It should be noted that Secure HR, LLC did not provide the filing indicating a Joint Venture or a statement indicating they are not a Joint Venture; a fully completed (signed and notarized) Exhibit 1 – Affidavit of No Conflict; and a completed W-9. Attached is the email I sent to the primary representative requesting these documents.

Once I receive the documents, I will revise the due diligence memo and send back for continuity.

Thank you very much!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Thursday, July 20, 2023 12:17 PM  
**To:** Lee Washington; Courtney DePol; Charlie Bishop; Sheila McLean  
**Subject:** FW: HR Assessment and Consulting Services Due Diligence of Response  
**Attachments:** Revised HR Assessment and Consulting Services Due Diligence Memo.pdf; SHR Not A Joint Venture Notice.pdf; SHR Conflict of Interest Affidavit.pdf; SHR W9.pdf

Good Afternoon County Administration,

I am writing to inform you all that I received the outstanding documents from Secure HR, LLC. Their proposal is now in compliance with the form of proposal.

A revised Due Diligence memo and the remaining documents are hereby attached for your records.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
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**From:** Jacob Erickson  
**Sent:** Thursday, July 20, 2023 8:31 AM  
**To:** Lee Washington <lee.washington@mymanatee.org>; Courtney DePol <courtney.depol@mymanatee.org>; Charlie Bishop <charlie.bishop@mymanatee.org>; Sheila McLean <sheila.mclean@mymanatee.org>  
**Subject:** HR Assessment and Consulting Services Due Diligence of Response  
**Importance:** High

Good Morning Lee,

Hopefully you are having a great start to this Wednesday! Attached, you will find the following three documents for your review:

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- Manatee County HR Proposal Response Final Draft.pdf
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## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Thursday, July 20, 2023 8:31 AM  
**To:** Lee Washington; Courtney DePol; Charlie Bishop; Sheila McLean  
**Subject:** HR Assessment and Consulting Services Due Diligence of Response  
**Attachments:** HR Assessment and Consulting Services Due Diligence Memo.pdf; Manatee County HR Proposal Response Final Draft.pdf; HR Assessment and Consulting Proposal Response.pdf; RE: Secure RFP for HR Services

Good Morning Lee,

Hopefully you are having a great start to this Wednesday! Attached, you will find the following three documents for your review:

- HR Assessment and Consulting Services Due Diligence Memo.pdf
- Manatee County HR Proposal Response Final Draft.pdf
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941-748-4501 Ext. 3053



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## Dana Rawls

---

**From:** Sheila McLean  
**Sent:** Wednesday, July 19, 2023 4:54 PM  
**To:** Jacob Erickson;Lee Washington;Courtney DePol;Charlie Bishop  
**Subject:** Re: HR Assessment

Thank you Jake

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---

**From:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Sent:** Wednesday, July 19, 2023 4:44:29 PM  
**To:** Lee Washington <lee.washington@mymanatee.org>; Courtney DePol <courtney.depol@mymanatee.org>; Charlie Bishop <charlie.bishop@mymanatee.org>; Sheila McLean <sheila.mclean@mymanatee.org>  
**Subject:** HR Assessment

Good Afternoon Lee, Courtney, Charlie and Sheila,

I am writing to let you know that I received Secure HR, LLC's proposal for the HR Assessment project. I will be conducting due diligence on the response and provide my findings based on the requested form of proposal and the proposal itself tomorrow morning.

Just wanted to keep you all in the loop. Thank you much!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053

## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Wednesday, July 19, 2023 4:44 PM  
**To:** Lee Washington; Courtney DePol; Charlie Bishop; Sheila McLean  
**Subject:** HR Assessment

Good Afternoon Lee, Courtney, Charlie and Sheila,

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Just wanted to keep you all in the loop. Thank you much!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Thursday, July 13, 2023 11:04 AM  
**To:** Courtney DePol  
**Cc:** Lee Washington  
**Subject:** RE: Proposal Request Letter

Hi Courtney,

Understood. I will reach out to him and relay the message.

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053



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2014 - 2022 and the  
*FAPPO Award for Excellence in Public Procurement*  
2015 - 2022

---

**From:** Courtney DePol <courtney.depol@mymanatee.org>  
**Sent:** Thursday, July 13, 2023 10:58 AM  
**To:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Cc:** Lee Washington <lee.washington@mymanatee.org>  
**Subject:** RE: Proposal Request Letter

Jake,

I would request that he return us the information by Friday July 21. BCC is back in session on 7/24 and it would be good to have something in hand in the event they request status. If that is not possible, let us know and we will relay that back to the Commissioners.

Very Respectfully,  
Courtney De Pol

**Courtney Z. De Pol, PE**  
Deputy County Administrator  
(941) 748-4501 x 3801 || Mobile: (941)718-7619  
[Courtney.DePol@mymanatee.org](mailto:Courtney.DePol@mymanatee.org)

---

**From:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Sent:** Wednesday, July 12, 2023 4:15 PM

**To:** Courtney DePol <[courtney.depol@mymanatee.org](mailto:courtney.depol@mymanatee.org)>

**Subject:** Fwd: Proposal Request Letter

Hi Courtney,

In Lee's absence, please see the response below.

Jacob Erickson, MBA, CPPO, NIGP-CPP

Purchasing Official

Manatee County Government

941-748-4501 Ext. 3053

---

**From:** Dennis Cooley <[dennis.cooley@securehr.com](mailto:dennis.cooley@securehr.com)>

**Sent:** Wednesday, July 12, 2023 4:10:43 PM

**To:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>

**Subject:** Re: Proposal Request Letter

**CAUTION:**This email originated from an external source.

**Be suspicious of Attachments, Links and Request for Login Information and utilize the REPORT MESSAGE Button in Outlook if you feel this is a Phishing email.**

Jacob,

Thanks for following up. My goal is next Friday but it may be a the beginning of the following week. Will that be okay?

Thanks,

Dennis

iApprove this message

On Jul 12, 2023, at 3:57 PM, Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)> wrote:

Good Afternoon Dennis,

Hopefully you are having a great Wednesday thus far and this email finds you well! I just wanted to touch base and inquire as to whether or not you had a projected timeframe for sending the County Secure HR, LLC's proposal pertaining to the Human Resource Assessment and Consulting Services? Any information would be greatly appreciated.

Thank you!

Jacob Erickson, MBA, CPPO, NIGP-CPP

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<image001.png>

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## Dana Rawls

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## Dana Rawls

---

**From:** Jacob Erickson  
**Sent:** Thursday, June 22, 2023 4:07 PM  
**To:** Lee Washington  
**Cc:** Sheila McLean  
**Subject:** Re: HR Assessment and Consulting Proposal Format

Very good. That was my takeaway as well but I just wanted to confirm.

Thank you!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
Purchasing Official  
Manatee County Government  
941-748-4501 Ext. 3053

---

**From:** Lee Washington <lee.washington@mymanatee.org>  
**Sent:** Thursday, June 22, 2023 4:04:18 PM  
**To:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Cc:** Sheila McLean <sheila.mclean@mymanatee.org>  
**Subject:** RE: HR Assessment and Consulting Proposal Format

Option 2, as the board seemed displeased with the previous consultant's resume.

Respectfully,

Lee Washington  
County Administrator, Acting  
Manatee County Government  
1112 Manatee Ave W., 9<sup>th</sup> Floor  
Bradenton, FL 34205  
Mailing: P.O. Box 1000  
Bradenton, FL 34206-1000  
(941)748-4501 ext. 3648 Office  
(941)290-8337 Mobile  
(941)749-3040 Fax

---

**From:** Jacob Erickson <Jacob.Erickson@mymanatee.org>  
**Sent:** Thursday, June 22, 2023 4:02 PM  
**To:** Lee Washington <lee.washington@mymanatee.org>  
**Cc:** Sheila McLean <sheila.mclean@mymanatee.org>  
**Subject:** RE: HR Assessment and Consulting Proposal Format

Good Afternoon Lee,

Happy Thursday to you, sir! I received a question pertaining to the HR Assessment and Consulting Proposal and they are looking for direction so they can accurately complete the proposal.

Is the intention to build on and implement the changes recommended by the previous consultant?

Or

Is the intention for a proposer to come in, start with a clean slate and fully evaluate the current state of HR in order to propose a plan / vision for how the HR Department should function?

I will be working remotely tomorrow but can be reached via cell phone at 941-705-8955 if you'd like to discuss further.

Thank you very much in advance!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
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**From:** Lee Washington <[lee.washington@mymanatee.org](mailto:lee.washington@mymanatee.org)>  
**Sent:** Friday, June 16, 2023 3:54 PM  
**To:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Cc:** Sheila McLean <[sheila.mclean@mymanatee.org](mailto:sheila.mclean@mymanatee.org)>  
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This is fine. Please move forward.

Respectfully,

Lee Washington  
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Bradenton, FL 34206-1000  
(941)748-4501 ext. 3648 Office  
(941)290-8337 Mobile  
(941)749-3040 Fax

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**From:** Jacob Erickson <[Jacob.Erickson@mymanatee.org](mailto:Jacob.Erickson@mymanatee.org)>  
**Sent:** Thursday, June 15, 2023 3:51 PM  
**To:** Lee Washington <[lee.washington@mymanatee.org](mailto:lee.washington@mymanatee.org)>  
**Cc:** Sheila McLean <[sheila.mclean@mymanatee.org](mailto:sheila.mclean@mymanatee.org)>  
**Subject:** HR Assessment and Consulting Proposal Format

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The proposal structure is almost identical (if not, less than) what we ask for in our other Requests for Proposals. I've also attached Exhibit 2, Proposal Response Requirements – RFP No. 23-TA004673SB as an example to show that this is not an extraneous exercise and is standard practice based on the County's established policies and procedures.

Please let me know if you have any objection to this course of action as I am planning to send this to the company either tomorrow (June 16<sup>th</sup>) or Monday (June 19<sup>th</sup>). I will be working remotely tomorrow so if we need to discuss, please feel free to call me on my work cell phone (941-705-8955).

Thank you much, sir!

Jacob Erickson, MBA, CPPO, NIGP-CPP  
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## Dana Rawls

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Lee Washington  
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