

Action History (UTC-05:00)

Submit

by Rachel Cigich 02-02-2026 05:00:57 PM (Start Form)

Approve

by Michael Fuino 02-04-2026 04:38:21 PM (Director Approval)

- The task was assigned to Michael Golen, Katlyn Coughlin, Michael Fuino 2/2/2026 5:01:00 PM
- Michael Fuino assigned the task to Michael Fuino 2/4/2026 4:38:13 PM

Approve

by Eric Ryan 02-05-2026 07:18:11 AM (IT Approval)

- The task was assigned to Eric Ryan, Wade Gore, Aaron Bourquin 2/4/2026 4:38:22 PM
- Eric Ryan assigned the task to Eric Ryan 2/5/2026 7:18:02 AM

Approve

by Nicole Brown 02-05-2026 07:31:43 AM (Budget Approval)

- The task was assigned to Nicole Brown, Mary Grace Stamper 2/5/2026 7:18:12 AM
- Nicole Brown assigned the task to Nicole Brown 2/5/2026 7:31:23 AM

Reviewed

by Michael White 02-05-2026 11:00:35 AM (Purchasing Specialist)

■ EVER-TERM
UNDER THRESHOLD
GOING TO COMMISSION 2/24/26

- The task was assigned to Bernice Moen, Michael White 2/5/2026 7:31:44 AM
- Michael White assigned the task to Michael White 2/5/2026 10:48:44 AM

Approve

by Alla Skipper 02-05-2026 11:03:34 AM (Purchasing Approval)

- The task was assigned to Alla Skipper, Keith Raney 2/5/2026 11:00:36 AM
- Alla Skipper assigned the task to Alla Skipper 2/5/2026 11:02:21 AM

Approve

by Marilyn Martinec 02-05-2026 02:22:07 PM (Finance Director)

- The task was assigned to Irina Kukharenc, Marilyn Martinec 2/5/2026 11:03:35 AM
- Marilyn Martinec assigned the task to Marilyn Martinec 2/5/2026 2:22:01 PM

Reviewed

by Lori Hollingshead 02-05-2026 03:08:51 PM (CM Executive Assistant)

- The task was assigned to Lori Hollingshead, Kaitlyn Griffin 2/5/2026 2:22:08 PM
- Lori Hollingshead assigned the task to Lori Hollingshead 2/5/2026 3:06:39 PM



Procurement Request

City of North Port

Request

Request Type *

Quotes

Capital? (?)

No Yes

PRR-EX (?)

Yes

FY *

2026

Type code *

P

Preparer

Rachel Cigich

Department *

CITY ATTORNEY'S OFFICE

Division(s)

Commission Date (?) *

02/24/2026

Agenda Item (?) *

26-0373

Purchase

Payment Method *

Visa Purchase Purchase Order

Purchase Type *

Single Purchase (current FY)
 Blanket Purchase (current FY)

Purchase SubType *

None Change Order
 Amendment

Description *

Professional Services for Training staff how to use the AI300 - ndMAX Enterprise (NetDocuments AI software)

Grant? *

Yes No

Technology Related? (?) *

Yes Renewal No

Technology type *

Training

Purchase Details

Line Items

Item #	Description *	Unit of Measure	Quantity *	Unit Price *	Subtotal
1	ndMAX Professional Service Hours	ea	10.00	\$250.00	\$2,500.00

Shipping (?) *

\$0.00

Total Charges

\$2,500.00

Accounts (?)

	Dept *	Account # (?) *	Project #	Amount *
1	CA	001-0200-514.31-05		\$2,500.00

Total Payments

\$2,500.00

Comments to Budget (?)

Funding for this purchase can come from the funds budgeted for "Executive Coach"

Vendor Details

Vendor Information (?)

Except for Emergency purchases, vendor MUST already be setup as a vendor in NaviLine.



Vendor Name *

ENCORETECH INC

Vendor Number *

8405

Vendor Name CST

Contact

Vendor Email

lwood@encoretech.com

Remittance Address

133 INLET WATERS CIRCLE, JUPITER, FL 33477

Phone

615-476-7817

Vendor Documentation Current (?) *

Yes No

Risk Documentation Current (?) *

Yes No Waiver Attached

YTD Expenses (?)

Department Inclusive (?) *

\$2,500.00

City Inclusive (?) *

\$2,500.00



CHANGE ORDER 1

PROJECT TITLE	Additional ndMAX Professional Service Hours
CLIENT NAME	North Port Florida City Attorney's Office
CLIENT CONTACT NAME, EMAIL, PHONE NUMBER	Rachel Cigich rcigich@northportfl.gov 941-429-7260
ENCORETECH POINT OF CONTACT	Gabriela Mezdrea - Encoretech Project Coordinator gmezdrea@encoretech.com
DATE SUBMITTED	January 20, 2026
SOW AUTHOR	Jess Rogers Account Executive JessRogers@encoretech.com M: 435-901-4735
	Jessica Kubala Director, Business Development jkubala@encoretech.com M: 908-510-4885
CHANGE ORDER NUMBER	2025-730 CO1

This Change Order 1 ("CO1") hereby modifies and is made an integral part of *2025-730 North Port Florida City Attorney's Office - ndMax Professional Service Hours - Encoretech SOW - Signed December 9, 2025* between North Port Florida City Attorney's Office ("Client") and Encoretech. Encoretech is a wholly owned subsidiary of Harbor Global, LLC. While the branding and marketing of the firm (including email addresses) are transitioning under the Harbor Global family, Encoretech continues to operate as a separate legal entity, capable of executing contracts and delivering services under those contracts. The acquisition does not alter Encoretech's contractual obligations or ability to perform services as described herein.

1. TASKS / ACTIVITIES

The following items are hereby modified as follows:

Added Services – Encoretech will provide up to 10 additional Professional Service hours for ndMAX Implementation and training. Professional Service hours will be valid for twelve (12) months from the date of execution of this CO1.

2. FEES and RATE SCHEDULE

FEES			
DESCRIPTION	QUANTITY	UNIT PRICE	COST
Additional ndMAX Professional Service Hours	10 hours	\$250	\$2,500



This Change Order No.1 is issued pursuant to and, upon execution, shall become incorporated in the SOW. Invoice will follow same schedule as defined in the referenced SOW.

Payment Milestones:

I. Milestone 1: 100% due upon execution of this CO1.

Note: Services will be scheduled once Encoretech receives Milestone Payment 1.

ALL TERMS AND CONDITIONS WILL FOLLOW THE TERMS DEFINED IN REFERENCE SOW.

By signing below, the authorized parties agree to the terms of this Change Order No.1, effective upon the date the last party executes.

3. AUTHORIZATION

AUTHORIZATION		
NORTH PORT FLORIDA CITY ATTORNEY'S OFFICE	SIGNATURE	
	PRINTED NAME	
	TITLE	
	DATE	
ENCORETECH, INC.	SIGNATURE	
	PRINTED NAME	Stacy Gittleman
	TITLE	Chief Executive Officer
	DATE	1/26/2026

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Encoretech Change Order 1

CITY OF NORTH PORT, FLORIDA

A. JEROME FLETCHER II, ICMA-CM,
MPA CITY MANAGER

ATTEST

HEATHER FAUST, MMC
CITY CLERK

APPROVED AS TO FORM AND CORRECTNESS

MICHAEL FUINO, B.C.S.
CITY ATTORNEY



MEMORANDUM
City Attorney's Office

TO: Purchasing

FROM: Rachel Cigich, Business Services Coordinator

DATE: February 2, 2026

SUBJECT: EncoreTech Procurement

Only one quote is being included for the professional services for training on the AI300 ndMAX software. EncoreTech is an implementation partner for NetDocuments. Although there is more than one implementation partner, EncoreTech is the selected vendor to be partnered with the City Attorney's Office for training.

This purchase is under threshold, as listed on page 1, 4. A. of the City of North Port Procurement Thresholds, giving the requesting department the responsibility and the authority to select the vendor and obtain pricing information.



1. Purpose

To provide policies concerning the solicitation of informal/formal competitive quotations and other methods of procurement.

2. Scope

This procedure applies to all procurements. More detailed information on Procurements \$100,000 or more may be found in the Procurement Policy and Procedure Manual.

3. Procedures

Purchases will be made using sound purchasing judgment without favor or prejudice, to ensure that public money is spent efficiently and effectively in accordance with City of North Port Procurement Code and Florida Statutes.

4. Dollar Thresholds

A. \$4,999.99 or Less:

The requesting department has the responsibility and the authority to select the vendor and obtain pricing information.

B. \$5,000.00 - \$34,999.99:

The requesting department issues an Informal Request for Quotation **using** the appropriate form provided on the intranet: “goods only” or “goods and/or services”. Any other format not pre-approved by Purchasing will be rejected. Three (3) written responses to the quotes from the vendor are required. Departments are to prepare a price comparison/tabulation with submittal and forward a copy of the requisition, Request for Quotations and quotes received to Purchasing. **Upon receipt of proper documentation and approval by Purchasing), a purchase order or Visa approval will be issued.**

C. \$35,000.00 - \$99,999.99:

Purchasing issues the Request for Quotation. The requesting department **must** provide sufficient information on products/services to Purchasing, so the request for formal quotation can be issued. Formal quotations will be sought by Purchasing using defined criteria and standard terms & conditions. Request for quotations will be due at a specified date and time. Minimum required documents from the requesting departments are as follows: Completed Formal Solicitation Request Form, Completed Insurance Requirements Form, appropriate Formal quotation form (located on the intranet) with specifications/scope, and pertinent information completed. **Upon approval by Purchasing, Finance Director, Assistant City Manager, and City Manager (as applicable), a purchase order will be issued in lieu of a contract to the vendor exhibiting the best price, delivery, and/or additional criteria, securing the terms & conditions of the solicitation. Payment may be made by Visa.**



D. \$100,000.00:

The **formal threshold** in accordance with the Procurement Code, non-exempt purchases for materials and/or services equal to and over this threshold require an approved piggyback, state contract, sole source, or they are subject to the formal solicitation process. All awards of formal solicitations \$100,000 or more require Commission approval. Purchases under Sec. 2-403(a) 1-4 a-b, Exemptions, do not require Commission approval unless there is a contract or agreement requiring a signature. Sole Source Purchases \$250,000 or more must be approved by Commission. Emergency Procurements exceeding \$250,000 require Commission approval.

5. Approval Levels for procurements (includes approval levels for exemptions, sole sources and emergencies for \$100,000 or more)

- **\$34,999.99 or less: Purchasing**
- **\$35,000.00 - \$49,999.99: Purchasing & Finance Director**
- **\$50,000.00 - \$99,999.99: Purchasing, Finance Director, Assistant City Manager, and City Manager**
- **\$100,000.00 +: Purchasing, Finance Director, Assistant City Manager, City Manager and Commission**
- **\$100,000.00+ (Code exemption Sec. 2-403): Purchasing, Finance Director, Assistant City Manager, City Manager**
- **\$100,000.00- 249,999.99 (Sole Source Sec. 2-407): Purchasing, Finance Director, Assistant City Manager, City Manager**
- **\$100,000.00-\$249,999.99 (Emergency Sec. 2-408): Purchasing, Finance Director, Assistant City Manager, City Manager**
- **\$250,000.00+ (Sole Source Sec. 2-407): Purchasing, Finance Director, Assistant City Manager, City Manager and Commission**
- **\$250,000.00+ (Emergency Sec. 2-408): Purchasing, Finance Director, Assistant City Manager, City Manager and Commission**

Purchasing may, at its discretion secure competitive bids/proposals regardless of the dollar thresholds listed above at any time.

- 6. Exemptions/Piggybacks/Cooperatives:** The City may exempt certain procurements from competition per Section 2-403 of the City's Procurement Code. Per Sec. 2-403(a) 1-4 a-b, the City may utilize specific exemptions listed in the code such as temporary personnel, membership dues and real estate broker services. The City may also utilize contracts or bids of other local governments or public entities to procure goods and services. Departments may piggyback another municipality, county, state contract, Florida Sherriff's Association bid, or joint cooperative. The requesting department must submit to Purchasing a properly completed Competitive Exemptions form (found on the Intranet), a copy of the bid, contract, tab-sheet and award documentation for



CITY OF NORTH PORT PROCUREMENT THRESHOLDS



the contract they wish to utilize as back-up documentation. Purchasing may request additional information.

The Department Director, not Designee, must sign exemptions form.

- 7. Sole/Single Source/Standardization:*** Pursuant to Section 2-407 – Sole Source Guidelines of the City’s Procurement Code, purchases are non-competitive purchase of supplies, equipment and contractual services that is either: the only item that will produce the desired results; or is available from only one source of supply who possesses the unique and singularly available capability to meet the requirement of the solicitation (such as technical qualifications, ability to deliver at a particular time, or services from a public utility). Sole Source services must be available only from vendors/manufacture (firms or individuals) who are uniquely qualified to perform such services. All Sole Source requests must include a letter from the vendor/manufacture certifying they are the sole provider. Sole Source requests will be posted for seven (7) calendar days on the City home page under “Purchasing Solicitations” (linked to Legal Notices), the City ftp site, and Demand Star as an “Intent to Sole Source.” This will give vendors/manufactures the opportunity to provide additional sourcing information, if any, regarding the Sole Source status. The Sole/Single Source/Standardization form can be found on the Intranet.

The Department Director, not Designee, must sign sole source form.

www.demandstar.com is available as a tool to obtain quotes. If you currently do not have access to DemandStar, please have your supervisor contact Purchasing to arrange training. ***Please direct all Procurement information and requests for clarification to: purchasing@cityofnorthport.com***