SUBJECT: Tax Deed Application and Services

BID #: ESC-0528-18 **OPEN DATE:** 10/17/18

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: Service Contract – Three (3) years from date of contract execution with three (3) one (1) year renewal options

AGENCY: Clerk of Circuit and County Courts

BASIS OF AWARD: Highest Scoring Bidder Based on Evaluation Criteria

NUMBER OF BIDS INVITED: 4 **NUMBER RECEIVED:** 2 **OTHER:** 0

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:

Recommend approval to reject Harris Recording Solutions as non-responsive for failure to submit Form 3, Insurance Agent Acknowledgement and adhere to requirements of Section 3, General Terms and Conditions of Agreement including indemnification and insurance. Recommend approval to move forward with an on-site demonstration with the highest scoring responsive, responsible bidder, Pioneer Technology Group in accordance with Section 2.5 of the RFP.

Attachments: Recommendation Memo, Tabulation and Scoring Sheets, Rejection Letter and Evaluation Criteria

ANALYST: _____ **RESPECTFULLY SUBMITTED** _____
Annette Burney GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: Allison Luker, Chief Financial & Administrative Officer, Clerk of the Circuit & County Courts

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(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED _____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

Clerk of the Circuit & County Courts

DUVAL COUNTY
501 WEST ADAMS STREET
JACKSONVILLE, FLORIDA 32202
TELEPHONE: (904) 255-2084 FAX: (904)255-2160

November 8, 2018

To: Gregory Pease
Chief of Procurement
Competitive Sealed Proposal Evaluation Committee

Thru: Allison Luker
Chief Financial and Administrative Officer

11/14/18 11:20:31
Procurement Division

From: Angel Brown
Manager to the Clerk

Subject: ESC-0528-18
Tax Deed Application and Services

The sub-committee comprised of representatives of the Clerk of the Circuit and County Courts, responsible for evaluating responses, has completed the evaluation process based on the criteria outlined in the Evaluation Matrix provided in the RFP referenced above. Each member submitted scoresheets individually for calculation.
We recommend the Respondent to conduct an on-site demonstration. Based on Respondents *Evaluation Matrix*, scores are as follows:

Respondent	**Total Points (100 Max)**
Pioneer Technology Group	89.67
Harris Recording Solutions	--

We recommend Harris Recording Solutions proposal be rejected as non-responsive. Harris Recording Solutions is unable to adhere to Insurance Requirement(s), and Performance Bond, within the RFP, without exceptions.

Sub-Committee Representatives:
Jennifer Spinelli
Christopher Douglas
Gerald Cates
Kiwana Griffin
Lisa Betros
Jonathan Ard

City of Jacksonville, Florida

Lenny Curry, Mayor

Procurement Division
Ed Ball Building
214 N. Hogan Street, Suite 800
Jacksonville, Florida 32202

ONE CITY. ONE JACKSONVILLE.

December 10, 2018

2290 Lucien Way Suite 330
Maitland, FL 32751

NOTIFICATION OF FORMAL BID REJECTION

BIDDER'S NAME: Harris Recording Solutions

CONTACT NAME: Gael Shellhaas

BID NUMBER: ESC-0528-19

NAME OF BID: Tax Deed Application and Services

DATE OPENED: 10/17/18

REASON FOR REJECTION:
Vendor is being rejected as non-responsive for failure to submit the following required information:

Form 3, Insurance Agent Acknowledgement and to adhere Section 3, General Terms and Conditions of Agreement, including indemnification (Exhibit A) and insurance (Exhibit B).

IF YOU WISH TO PROTEST THE RECOMMENDED REJECTION OF THIS BID, PLEASE RESPOND IN ACCORDANCE WITH THE CITY OF JACKSONVILLE BID PROTEST PROCEDURES. DIRECT ALL PROTEST TO THE RESPECTIVE ANALYST/BUYER, FACSIMILE NUMBER (904) 255-8837.

BUYER'S SIGNATURE: _____
Annette L. Burney

Leslie-Burney, Annette

From: Leslie-Burney, Annette
Sent: Monday, December 10, 2018 12:15 PM
To: Gael Shellhaas (GShellhaas@harriscomputer.com)
Cc: Freeman, Dustin
Subject: ESC-0496-18 Tax Deed Application and Services
Attachments: REJECTION NOTICE.pdf

Please find the attached rejection letter for the above RFP. Please email me with any questions or concerns.

Thank you,

Annette L. Burney
Purchasing Analyst
Procurement Division
Finance and Administration Department
214 N. Hogan Street, Suite 800
Jacksonville, FL 32202
Ph.: 904-255-8810
Fax: 904-360-8527
Email: aburney@coj.net

*** Privacy Act: This communication may contain privileged or other official city information. If you are not the intended recipient or believe that you have received this communication in error, please reply to the sender indicating that fact and delete the copy you received. It is a violation of Federal Law to print, copy, retransmit, disseminate, or otherwise use this information.

-----Original Message-----
From: P0697@coj.net [mailto:P0697@coj.net]
Sent: Monday, December 10, 2018 12:03 PM
To: Leslie-Burney, Annette
Subject: REJECTION NOTICE

Please open the attached document. It was scanned and sent to you using a Xerox Multifunction Printer.

Attachment File Type: pdf, Multi-Page

Multifunction Printer Location: Ed Ball 8th Floor
Device Name: P0697

TITLE: TAX DEED APPLICATION AND SERVICES BID NO.: ESC-0528-18 OPEN DATE: 10/17/18@ 2 P.M. ANALYST: Annette Burney No. Invited: (4) No. Received (2) No Bids: (0) Recorded By: Renata Barnett Announcer: Sharon Williams		Harris Recording Solutions	Pioneer Technology Group	
NOTES:		Reject/Exceptions to Performance Bond, Insurance Requirement & Sect. 3		
TOTAL PRICE		$ 306,750.00	$ 351,785.00	
Ability to Meet Project Requirements	70			
Pricing	10			
References	15			
Personnel	5			
TOTAL POINTS	100			
MINIMUM REQUIREMENTS		✓	✓	
CONFLICT OF INTEREST		✓	✓	
INSURANCE AGENT ACKNOWLEDGEMENT		X	✓	
BID BOND		✓	✓	
ADDENDUM (0)		N/A	N/A	

TAX DEED APPLICATION AND SERVICES

ESC-0528-18

Total Points	70 Points	10 Points	15 Points	5 Points	OVERALL	Rank
Proposers	Ability to Meet Project Requirements	Pricing	Reference	Personnel	100 Total Points (100 max)	
Vendor Name						
Jonathan Ard	61.00	7.00	12.00	5.00	85.00	
Lisa Betros	56.00	8.00	15.00	5.00	84.00	
Gerald Cates	58.00	8.00	15.00	5.00	86.00	
Christopher Douglas	66.00	9.00	15.00	5.00	95.00	
G. Kiwana Griffin	68.00	9.00	15.00	3.00	95.00	
Jennifer Spinelli	65.00	8.00	15.00	5.00	93.00	
Average	62.33	8.17	14.50	4.67	**89.67**	

ATTACHMENT A

RESPONSE FORMAT

To maintain comparability and facilitate the evaluation process, Responses shall be organized in the manner set forth below. **Tab delineations for each of the five sections, sub-sections and attached documents referenced in Response are required.**

1) **Title Page:** Include RFP Title, RFP Number, Proposer's full name, address, phone number.

2) **Cover Letter:** Include the following:

- Date of Letter.
- RFP Title and Number
- Proposer's full name, address and phone number.
- Names of the persons who will be authorized to make representations for the Proposer, their titles, addresses (including email address) and telephone numbers.
- Proposer's Federal Employer ID Number.
- Acknowledgement that (i) the Response is based on the terms set forth in the RFP and all amendments thereto posted on Buyer's website as of the date of the Response, and (ii) the Proposer will be responsible for monitoring Buyer's website for subsequent amendments and for either maintaining, amending or withdrawing the Response prior to the Response Due Date based on those subsequent amendments.
- Signature of Authorized Representative.

3) **Required Forms.** Attach all forms identified in Section 1 or in the Attachments, if applicable, each signed by an authorized representative. Examples of the forms that may be required include:

- Price Sheet (Form 1)
- Conflict of Interest Certificate (Form 2)
- Insurance Agent Acknowledgement (Form 3).
- Response to Minimum Requirements (Form 4)
- Affidavit – Compliance with Minimum Requirements (Form 4A & B)
- Response and Application Requirements (Form 5)
- Response to Cashiering and Accounting Requirements (Form 6)
- Response to System Requirements (Form 7)
- Response to Vendor Requirements (Form 8)
- Response to Vendor Personnel Requirements (Form 9)
- Proposal Bond (Attachment E)

4) **Proof of Minimum Requirements.** Responses will ONLY be accepted from companies meeting the minimum requirements in Section 1 of the RFP. Proposer must provide clear documentation that they meet the minimum requirements.

5) **Statement of Qualifications.** This portion of the Response will be used to provide the information Buyer needs to evaluate how well the Proposer meets the criteria listed in Attachment B – Evaluation Criteria. Failure to provide adequate information on any criterion will result in lower scores and could result in rejection of the Response as non-responsive. Please divide this portion of the Response into subsections that correspond to each of the listed criteria.

ATTACHMENT B

RFP SCORING AND EVALUATION CRITERIA

RFP SCORING PROCESS

The scoring process of the RFP consists of 3 steps:

1. Ability to meet all Minimum Requirements
2. Evaluation Criteria
3. On-Site Demonstration

A. ABILITY TO MEET MINIMUM REQUIREMENTS

As stated in section 1.4, the Proposer must satisfy the mandatory minimum requirements in order to have their Response evaluated as defined in the Evaluation Criteria. By submitting a response, the Proposer warrants and represents that it satisfies these requirements. Failure to meet these requirements at the time of bid opening will result in the Response not being evaluated and being rejected as non-responsive. Proposers are to arrange their responses in the format found on **Form 4.**

B. EVALUATION CRITERIA

1. REQUIREMENTS: ABILITY TO MEET THE PROJECT REQUIREMENTS. Describe the Contractor's ability to meet the requirements of this solicitation, and its ability, approach and/or plan to satisfy the same in complete compliance with all applicable federal, state and local laws, statutes, ordinances, rules and regulations. Contractors are to arrange their responses in the format found on **Forms 5 – 7. (70 total points)**

2. PRICING: QUOTATION OF RATES, FEES OR CHARGES AND OTHER DETAILED COST PROPOSAL OR COST BREAKDOWN INFORMATION. On Form 1 – Describe the Contractor's overall willingness to meet both time and budget requirements for the project, in particular, proposed total compensation or unit price quotations, including, without limitation, hourly rates, fees, or other charges that will ultimately be used during contract negotiations to calculate or determine total compensation. **(10 total points)**

3. REFERENCES: PAST AND PRESENT RECORD OF PROFESSIONAL ACCOMPLISHMENTS WITH COMPARABLE AGENCIES. On Form 8 – Vendor Information, provide a list of all clients located in all states, including Florida, currently using the latest version of the application. When contacting THREE (3) random references, the reference has 3 business days to return phone call and / or email, otherwise they will be scored as unable to contact and another one will be contacted. **(15 total points)**

   Each Reference must include the following information:

   I. Customer Contact Name, Phone Number, Title and email address.
   II. Organization Name and Address.
   III. Describe briefly the current version the client is using and how long they have been using the application.

4. PERSONNEL: RESUMES FOR MEMBERS OF THE PROJECT MANAGEMENT TEAM. On Form 9 – Vendor Information, provide a list of all employees working on the project, including project management team and support staff. **(5 total points)**

   Each resume must include the following information:

   I. Employee Name, Office Phone Number, Title and email address.
   II. Number of years with the contractor.
   III. Number of years working on the Tax Deed Application.
   IV. Number of years in current Title with the contractor.

ATTACHMENT B (Continued)

C. ON-SITE VENDOR DEMONSTRATION

Based on the scoring of the Responses, Buyer will select no fewer than three (3) but no more than five (5) of the highest scoring Proposers to participate in on-site demonstrations. One and a half hours (1.5) will be allotted for this meeting. Proposer must provide a live demonstration of their application, highlighting any, and all, answers provided in the RFP response as directed by the Clerk.

The evaluation will be based upon the below criteria. Each criterion will be evaluated relative to the other demonstrations and awarded a score of 1 through 30 points. Please note that on-site demonstrations categories have a combined total 125 points.

a) **Presenter (5pts)** – How well the presenter demonstrates knowledge of the proposed Tax Deed Application, Florida Statutes and overall tax deed knowledge.

b) **Application Design (20pts)** – Demonstration of the applications use of multiple screens and ability to see documents quickly and with minimal arrangement while entering data at the same time. Navigation through the application is intuitive.

c) **Daily Process and Flow (30pts)** – Demonstration of the end-user proceeding through a typical daily activity, transitioning through the stages of a Tax Deed File. Typical activities should include the below as a minimum: **(2pts each)**

1. Create a Tax Deed File
2. Create a Sale
3. Data Entry - Auto populated from imported file, copy text from images, or full data entry; verification of data
4. Assigning Tax Deed File to a Sale
5. Pulling Tax Deed File from a Sale - Process of redeeming a property, bankruptcy, etc.
6. Cashiering Applicants payment and Bidders deposits – Show multiple payment options
7. Sending Letters - All letters throughout life cycle of Tax Deed File, Cost, NOA, Sheriff, Publishing, Surplus, No Bid, etc.
8. Sending and receiving eRecord documents
9. Sending and receiving Data to/from Auction Site - showing changes made to files for those sold and not sold during the auction
10. Cashiering the Bidder's payments for balances - from counter, escrow
11. Post Sale distribution of allocated post sale funds to parties, or sending file back for resale
12. Awarding Tax Deed to winning bidder
13. Distribution and tracking of Surplus funds, including escheatment
14. Moving Tax Deed Files to List of Lands Available - including what the public would see and options available for public to make requests
15. Closing a Tax Deed File - all possibly resolutions of a Tax Deed File, including, not limited to, pulling files for redemption, escheatment, etc.

d) **Workflows and Triggers (10pts)** – Demonstration of moving Tax Deed File through stages with application alerting what is required next throughout the process.

e) **Website (10pts)** – Demonstration of public and registered access to the website and what is available to each role types.

f) **Searching (5pts)** – Demonstration of search capabilities, looking for ability to search any part of a tax deed file, including any OCR abilities, or other abilities to search tags on documents, of documents.

g) **Cashiering Module (15pts)** – Ability to receipt payments of all acceptable types; ability to see ledger of a Tax Deed File to see outstanding balances, outstanding surplus, and payments made from Tax Deed File after sale; daily closeouts and reconciliations.

h) **System Flexibility and Management (5pts)** – Ability to make changes to the application, to include updating fee amounts, associating fees to party types, associating correspondences to party types.

i) **Reports and Dashboards (10pts)** – Ability to run reports for individual or bulk Tax Deed Files, status reports, financial reports, etc.

j) **Overall Ease of Use (15pts)** – How intuitive the application is to the novice user; user-friendliness of the application; flexibility of the system to perform daily operations.

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