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City of Jacksonville, Florida

Procurement Award Form (PAF)

Part 1 – Form Type: JPAC Award Request: Renewals, Extensions, and Unit Price Increases

Goods and/or Services: Personal Exemption Compliance Services

Requested Action and Justification:

Recommend approval of award to The Exemption Project, Inc. (DBA TrueRoll) as the highest-scoring, responsive, responsible bidder. Period of service will be from date of executed contract through September 30, 2026 with four (4) one (1) year renewal options.

Please note that this is a revenue generating project. Awarded supplier receives 27% of the fees collected minus a 2% administration fee payable to the Duval County Tax Collector's Office.

To be executed by formal contract amendment through the Office of General Counsel.

Supplier:	The Exemption Project, Inc.	**Basis of Award:**	Highest Evaluated	**BID Opening Date:**	12/09/2025

POA #:	N/A	**PO #:**	N/A	**Change Order #:**	N/A
Solicitation #:	RFP-NONCON 17168-26 26	**Contract #:**	N/A	**Contract ADM #:**	N/A
Term:	1 year	**Options:**	4, 1-year renewal	**Options Used:**	N/A

Federally Funded:	No	**JSEB Rec:**	Encouragement
Licenses Verified:	N/A	**JSEB %:**	0
Bonds Required:	No	**Bonds Waived Pursuant To:**	N/A

Fund:	00191	**Center:**	810001	**Acct:**	531090	**Proj:**	000000	**Activity:**	00000000	$ 0
Fund:		**Center:**		**Acct:**		**Proj:**		**Activity:**		$
Fund:		**Center:**		**Acct:**		**Proj:**		**Activity:**		$

New NTE/GMP:	$ 0	**Contingent Amt:**	$ 0	**DMP/ODPO Amt:**	$ 0

Using Agency/BU:	PAAD:ADMINISTRATION		
Concurrence:	Signed by: Joyce Morgan C3CAD8BB20524D1...	**Title:**	Duval County Property Appraiser 2/3/2026
Concurrence:		**Title:**	
Concurrence:		**Title:**	
Concurrence:		**Title:**	

Procurement Analyst/Buyer:	Signed by: Ruth Keith C58E7E28D7654E9...	**Chief of Procurement:**	Signed by: 2/17/2026 B10F1D51735245 6...
Name:	Ruth Keith	**Name:**	Dustin L. Freeman

Part 2 – JPAC Action: All award actions subject to lawfully appropriated funds.		**Part 3 – Final Awarding Authority Action:**	
Members who approve:		**Action:**	
Members who disapprove:		**Signature:**	
Date:		**Date:**	

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PAF Instructions
Part 1 (using agency)

Form Type: This form will be used for both Administrative Awards and JPAC Requests. Select type from dropdown options.

Goods and/or Services: Enter a brief description of the types of goods and services included in the request.

Requested Action and Justification: Enter a brief description of the requested action or authority being sought. i.e.; *Request permission to award the lowest, responsive responsible bidder for an ITB or award the highest ranked supplier for an RFP.* This block should also be used for additional information such as additional 4th account strings, or other information essential for contract execution.

Supplier: Enter awarded supplier name**.** If multiple, include in "Requested Action and Justification" box.

Basis of Award: Select from Lowest Price Technical Acceptable (LPTA), Highest Price Technical Acceptable (HPTA) or N/A.

Bid Opening Date: The date bids were unsealed by Procurement.

POA #: This is your 1Cloud generated Agreement number. Select Type, Enter Number.

PO #: Enter the PO number or agreement release number.

Change Order #: Provide the applicable change order number represented by this request.

Solicitation #: Select Prefix type, Enter Number, and Year.

Contract #: This number should be the same as your POA number (unless procured prior to 2020)

Contract Amendment #: Provide the applicable amendment number represented by this request.

Term: Select the Period of Performance or Term for the initial period.

Options: Period of time for each renewal or option.

Options Used: Prior to this request, enter how many options were already used.

Federally Funded: Select yes or no from dropdown if Federal Funds will be used.

JSEB Rec: Select Encouragement or JSEB Set Aside Option.

JESB %: If JSEB Participation, enter the percentage.

Bonds Waived Pursuant to: Select option from Drop down.

Funding Sources: Fund/Center/Account/Project/Activity, all fields are required even if zeros.

New NTE/GMP: Enter the new total not to exceed amount. Note, this should match the contract maximum indebtedness, if applicable**.**

Contingent Amount: If your agency requests an allowance for unforeseen additional expenses, then specify the amount of your requested increase and new NTE that represents the contingency allowance. This is over and above any quote.

DMP/ODPO Account: Enter the Direct Materials Purchase/Owner Direct Purchase Order Account. Used mainly for CIP (Capital Improvement/Construction) Projects

Using Agency/BU: Select one from the dropdown list.

Concurrence: Using Agency internal routing requirements for Electronic Signatures (follow Proc Manual for threshold requirements)

Title: Title of person electronically signing form.

Attachments: Included any supplemental information to the Procurement Award Form. i.e.; *Scope of work, previous awards*.

**Any field where there is no data available, or no entry is required, either leave it blank or enter N/A. Any fields where there is known data, include for informational purposes. Any changes to an original award should contain the data that is being changed and any other relevant data required for JPAC review and approval.*

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Request for Proposal (RFP) Personal Exemption Complian

RFP-17168-26

Total Points	20 Points	20 Points	15 Points	15 Points	10 Points
Suppliers	**COMPETENCE**	**APPROACH AND WORK PLAN**	**TECHNOLOGY PLATFORM & INTEGRATION**	**STAFFING AND TRAINING PLAN**	**EXPERIENCE AND REFERENCES**
Vendor: The Exemption Project, Inc. (TrueRoll)					
Joyce Morgan	18.00	19.00	15.00	14.00	10.00
Keith Hicks	18.00	18.00	12.00	12.00	8.00
Desi Green	20.00	20.00	12.00	12.00	8.00
Laura Winter	19.00	18.00	13.00	14.00	9.00
Teresa Pulley	16.00	17.00	14.00	12.00	9.00
Average	18.20	18.40	13.20	12.80	8.80

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ce Services

10 Points	5 Points	5 Points	OVERALL	Rank
IMPLEMENTATION PLAN AND DELIVERABLES	PARTNERSHIP AND COMMUNICATION	FEE STRUCTURE AND VALUE	Total Points (100 max)	
6.00	5.00	5.00	92.00	
9.00	4.00	5.00	86.00	
10.00	5.00	4.00	91.00	1
8.00	4.00	5.00	90.00	
9.00	4.00	5.00	86.00	
8.40	4.40	4.80	**89.00**	

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Award Solicitation: Request for Proposals (RFP) Personal Exemption Compliance Services

Solicitation **RFP - Non-Construction 17588** Procurement BU **CCU BU** Close Date **12/9/2025 16:00** Solicitation Currency **USD**	Responses Received **1** Active Responses **1** Shortlisted Responses **1**	Invited Suppliers **223** Will Participate **1** Responded **1**

Line Summary

Requisitioning BU	Line	Item	Item Revision	Supplier	Business Relationship	UOM	Quantity	Response Quantity	Award	Award Quantity	Rank	Response Price	Score	Promised Delivery Date	Supplier Site	Response	Requested Delivery Date	Category Name	Location	Line Type
PAAO: Property Appraiser's Office	1 Please add $1.00			The Exemption Project, Inc.	Spend Authorized				Yes		1	0.27	100.00			492757		208.53 Integrated Software	Yates Suite 270	Orders

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Award Solicitation: Request for Proposals (RFP) Personal Exemption Compliance Services

Solicitation **RFP - Non-Construction 17168** Procurement BU **COJ BU** Close Date **12/9/2025 16:00** Solicitation Currency **USD**	Responses Received **1** Active Responses **1** Shortlisted Responses **1**	Invited Suppliers **223** Will Participate **1** Responded **1**

Overview

	The Exemption Project, Inc Response: 455757
Business Relationship	Spend Authorized
Supplier Site	
Supplier Contact	Masterson, Tyler
Response Status	Active
Shortlist Status	Included
Response Amount	0.27
Overall Rank	1
Total Award Amount	
Time of Response	12/5/2025 17:11
Response Valid Until	
Reference Number	
Note to Buyer	
Attachments	No

Requirements (View Scoring Criteria)

	Requirement	Target Value	The Exemption Project, Inc Response: 455757
	Total Score		**0.00**
1.	**Affirmation (Preliminary Response Stage)**		
1.	Type name and title of person submitting		a. Acknowledge
	Comments		Tyler Masterson - CEO
2.	Type name of company in the comments box		a. Acknowledge
	Comments		The Exemption Project Inc. (DBA - TrueRoll)
3.	No Alterations: Bidder has not altered the original Solicitation Document in any way and further understands that any such alteration of the original solicitation document may result in rejection of the bid.		a. Acknowledge
4.	Solicitation Silence: The Solicitation Silence policy is in effect for this solicitation and all communications related to this solicitation must be in writing to the designated procurement representative. Violations of the solicitation silence policy may result in the rejection/disqualification of the submission.		a. Acknowledge
5.	Legal authorization and solicitation specific minimum requirements: All bidders must be legally authorized to do business in Duval County and shall comply with all minimum requirements for this bid. Failure to submit evidence for meeting any of these requirements may be grounds for rejection. Vendor shall provide proof of applicable local business licenses and particulars such as specific licensure, experience on similar projects, years of expertise in the area etc.		a. Acknowledge
6.	Certification of No Conflict of Interest: Supplier certifies that no official or employee of the City or independent agency requiring the goods or services described in the specifications has a material financial interest in the Supplier's company. Supplier must complete and submit the attached Conflict of Interest Statement fully detailing any potential conflicts.		a. Contractor certifies that no official or employee of the City or independent agency requiring the goods or services described in the specifications has a material financial interest in the Contractor's company.
7.	Equal Business Opportunity Program: Pursuant to Part 6 of Chapter 126, Jacksonville Ordinance Code, the City of Jacksonville encourages the utilization and participation of Jacksonville Small and Emerging Businesses (JSEBs) in its contract awards based upon availability. It is the City's intent in adopting this program to reflect the philosophy with regards to enhancing participation of JSEBs in all areas of procurement.		a. Acknowledge
8.	Electronic Signature: I understand this acknowledgment serves as my electronic signature and has the same force and effect as my manual signature.		a. Acknowledge
2.	**Submittal Statement (Preliminary Response Stage)**		
1.	Submittal Statement Bidder certifies that this proposal is made in good faith, without collusion or connection withany other entity bidding on this work. Bidder has examined and read all Drawings, Specifications, General and Special Conditions,and other Contract Documents, and all Addenda thereto; and is acquainted with and fullyunderstands the extent and character of the work covered by this Proposal and the specifiedrequirements, for the proposed work. Bidder certifies that no officer or agent of the CITY will directly or indirectly benefit from this bid.Bidder states that this Proposal is made in conformity with the Contract Documents and agreesthat in case of any discrepancy or differences between its Proposal and the Contract Documents,the provisions of the latter shall prevail. Bidder certifies that it has carefully examined the foregoing Proposal after the same wascompleted and has verified every item placed thereon; and agrees to indemnify, defend and saveharmless the CITY against any cost, damage or expense which may be incurred or caused by anyerror in the Bidder's preparation of same. Bidder states that all applicable taxes are included in the unit prices or Lump Sum Bid andacknowledges this project is not exempt from the State or Local Sales or Use taxes, and paymentof such taxes is the responsibility of the Bidder. The undersigned Bidder agrees to keep its bid in effect for 120 calendar days after theBid Opening date to allow the CITY time to award the bid, should it be awarded, and timeto prepare and execute the contract (or issue the purchase order). This time period begins atthe time bids are opened and ends upon the issuance of Notice to Proceed (NTP) by the CITY.The bid prices shall remain in effect throughout the life of the Contract. Failure of the CITY toissue NTP within the specified time period shall allow Bidder to withdraw its Bid andterminate its contract without penalty or forfeiture of Bid Bond. Failure of the CITY to issueNTP within the specified time period shall not entitle Bidder to an adjustment of its Bid prices,unless mutually agreeable by the CITY. Bidder certifies, under penalty of perjury and contract rescission, that it has all required licenses toperform the work required to fulfill the terms of the contract resulting from a successful bid.Furthermore, the Bidder affirms that all subcontractors requiring to be licensed are listed in itsresponse and are properly licensed to perform work on their respective portions of this project.		a. Acknowledge
3.	**General Requirements (Preliminary Response Stage)**		
1.	**Scope of Services and Deliverables**: The Duval County Property Appraiser's Office (DCPA) of the City of Jacksonville, Florida is currently accepting bids, proposals from qualified vendors to provide comprehensive homestead exemption compliance services. This initiative supports the full lifecycle of exemption management—from initial application vetting through ongoing monitoring and investigative support —with the goal of improving tax roll accuracy, reducing revenue loss, and enhancing public trust. The selected vendor will provide an integrated solution combining technology, data analytics, and investigative services that emphasizes early detection, taxpayer outreach, and operational efficiency. The vendor shall provide the following core services: 1. Application Eligibility Verification · Integrate with DCPA's exemption application process. · Apply automated screening rules and data cross-checks to verify applicant eligibility upfront. · Flag potential risks for manual review by DCPA staff. Provide evidence-based reports to support approval or denial decisions. 2. Ongoing Monitoring & Risk Analytics · Continuously monitor exemption accounts for changes that may affect eligibility (e.g., property transfers, marriage/divorce, rental activity, out-of-county homesteads). · Utilize multiple data sources, including—but not limited to—local, state, and national property and residency databases. · Deliver monthly candidate lists for review, prioritized by confidence level. · Leverage machine learning and predictive analytics to identify exemption risks and trends. 3. Investigative & Compliance Support · Conduct investigations of flagged exemptions with documented case files. · Provide DCPA staff with evidence packages that meet Florida statutory requirements. · Provide detailed, annotated reports with supporting documentation (e.g., deeds, court records, voter data). · Follow DCPA's evidence standards and leave all enforcement decisions to the Property Appraiser's discretion. · Assist with preparation of cases for enforcement or legal action when necessary. 4. Technology Platform & Integration · Deliver a secure, cloud-based platform accessible to DCPA staff with role-based permissions. · Vendor is responsible for all technology procurement, hosting, licensing, and maintenance — **no upfront or ongoing technology cost to the DCPA**. · Provide a secure interface for DCPA staff to upload exemption applications, Tax-Roll data, and other relevant inputs, and to download resulting case files, review lists, and reports. Direct integration with DCPA's CAMA system is not permitted. · Provide case management tools, dashboards, and reporting functions. Ensure compliance with all COJ data privacy, security, and retention requirements. 5. Training & Support · Provide ongoing training to DCPA staff on system functionality and workflows (in-person or virtual). · Offer periodic refresher training and updates when new features or rules are implemented. 6. Partnership & Support · Collaborate with DCPA staff to align workflows, reporting formats, and enforcement protocols. · Maintain open communication and responsiveness throughout the contract term. 7. Fee Structure – Contingency-based pricing tied to verified revenue recovery by the Duval County Tax Collector. – Enforcement actions (e.g., liens) remain at the sole discretion of DCPA. 8. Performance Expectations – Capacity to scale services to meet the needs of a large urban county with diverse property types and exemption profiles. – Making sure the vendor's systems and staffing can handle the size and diversity of Duval County's property base. **Deliverables** The vendor shall provide, at minimum, the following deliverables: · · Implementation Plan: A detailed project plan with timelines, milestones, and responsibilities for system implementation and staff training. · · Technology Platform: Fully functional, secure software platform with case management, analytics, and reporting capabilities. · · Monitoring Dashboard: Real-time reporting on exemption status and flagged cases. · · Case Files: Documented evidence packages for each investigated case, suitable for administrative and legal review. · · Monthly & Quarterly Reports: Metrics on application screenings, flagged cases, investigations completed, and exemptions corrected or removed. · · Annual Program Assessment: Comprehensive review of program outcomes, taxpayer impacts, and recommendations for continuous improvement. · · Staff Training Materials: Documentation, user guides, and training modules for DCPA staff.		a. Acknowledge
2.	**Bidders should submit or comply with the following requirements. Failure to submit any of these requirements may be grounds for rejection.** – Demonstrated experience providing homestead exemption compliance services to property appraiser or tax assessment offices within the State of Florida. – Must include at least one Florida-based engagement within the past five years. – Experience should reflect familiarity with Florida statutes, exemption types, and administrative procedures. – Experience working with counties of comparable size and complexity to Duval County, including urban and suburban parcel diversity, high exemption volume, and multi-agency coordination. – Proven ability to work within the operational and legal frameworks of Florida counties, including coordination with local staff and adherence to public records requirements. – Must include at least one project example or client reference from a Florida county demonstrating that they've handled similar work. Ideally something that shows familiarity with Exemption compliance, coordination with local staff, and related Florida guidelines & statutes. – Submission of at least two references or case studies from Florida-based engagements. – References		a. Acknowledge
3.	To maintain comparability and facilitate the evaluation process, Responses shall be organized in the manner set forth below. Tab delineations for each of the sections would be helpful. The formal response to the RFP - Non-Construction. Each proposer will clearly indicate within the Cover Letter that your response is for the RFP. The RFP shall contain no more than thirty (30) single-sided, 1.5-spaced, 8½" by 11" pages, excluding appendices. The font style shall be Arial with a minimum font size of 11 points. The title page and a single-page cover letter will not be counted as part of the 30-page limit. A cover letter in excess of one page and any other information submitted beyond that noted in the requirements will be counted as part of the 30-page limit. Any RFP exceeding these formal guidelines will be rejected without being considered by the City. Provide proof of insurance, bonding capacity, and licensing. Copies of these documents may be included as appendices and will not be counted against the 30-page limit. 1) Title Page: Include only RFP Title, RFP Number, Contractor's full name, address, phone number. 2) Cover Letter: Include only the following: Date of Letter. RFP Title and Number Bidder's full name, address and phone number. Names of the persons who will be authorized to make representations for the Bidder, their titles, addresses (including email address) and telephone numbers. Bidder's Federal Employer ID Number. Acknowledgement that (i) the Response is based on the terms set forth in the RFQ and all amendments thereto posted on City's website as of the date of the Response, and (ii) the Bidder will be responsible for monitoring City's website for subsequent amendments and for either maintaining, amending, or withdrawing the Response prior to the		a. Acknowledge

Response Due Date based on those subsequent amendments.
Signature of Authorized Representative.

3) Required Forms. Attach all forms identified in requirements section. Examples of forms that may be required include:

Business References. (if requested)
Equal Business Opportunity Program Forms (if requested).
Proposal Bond (if requested)
Insurance Agent Acknowledgment (if requested)

4) Proof of Minimum Requirements. Responses will be accepted ONLY from companies meeting the minimum requirements in section of the RFP. Bidders 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 City needs to evaluate how well the Contractor meets the criteria listed in the 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.

Attach
Overall Proposal Document Here. Use the following naming convention:
Supplier_Name Overall Proposal Document. Include all required forms in a single ".PDF" format file.

	Attachments		Yes
4.	Federal Funding does not apply to this RFP		a. Acknowledge
4.	**RFP Non-Construction Requirements (Preliminary Response**		
1.			a. Acknowledge

1. Introduction
The City of Jacksonville ("Buyer") intends to hire an individual or firm ("Contractor") to provide the services described in this Request for Proposal ("RFP"). Persons interested in submitting a response to this RFP (a "Response") should carefully review this RFP for instructions on how to respond and for the applicable contractual terms.
2. Questions and Requests for Amendment to RFP. If a Contractor (i) has questions about the RFP, (ii) finds discrepancies, omissions or ambiguities in the RFP, or (iii) believes any term or condition of the RFP is unreasonable, Contractor should request an amendment to the RFP. The request should reference the RFP section at issue and include any specific language that Contractor recommends using.
All requests for amendment must be submitted in writing (via the 1Cloud Procurement System) and, unless otherwise specified in the RFP, be received by the Purchasing Analyst (Analyst) at least ten (10) calendar days before the Response Due Date. Questions and requests for amendments directed to the Analyst or to any other Buyer personnel shall not constitute a formal protest of the RFP. Failure to request an interpretation or change will be considered evidence that Contractor understands and agrees to the provisions of the RFP.
The posting of a written amendment is the only official method by which interpretations, clarifications, changes or additional information will be given by Buyer prior to the opening of Responses. Any other interpretation, clarification, change or information will have no legal effect.
Buyer reserves the right to amend, cancel or reissue the RFP at its discretion. Buyer reserves the right to request or obtain additional information about any and all Statement of Qualifications submitted in response to RFP. They may also issue addenda to this RFP which will be sent to each Supplier who received this RFP. This includes the right to change the Response Due Date and the Contract award date. Notice of all amendments and cancellations will be posted on Buyer's website (please contact the Analyst if you are uncertain of the website address or if you experience problems accessing it). Contractor is responsible for monitoring this website for new or changing information.
3. Terms of Agreement. After award to the successful Contractor, Buyer and Contractor will promptly enter into a written agreement (the "Contract") incorporating the terms of the RFP, the successful Response, and other terms and conditions as may be agreed to between the parties. To the extent the Response contains exceptions to or modifications of the RFP, such exceptions or modifications are stricken unless Buyer affirmatively accepts the exceptions or modifications in the Contract. The Contract will be substantially in the form set forth in an attachment to the RFP. Buyer will not be obligated to pay Contractor for the RFP services until the Contract is signed by both parties. Buyer retains the right to reject all bids and/or amend its notice of award at any time prior to the full execution of the Contract.
If the successful Contractor fails to perform the Services as agreed, Buyer reserves the right to (i) issue a new solicitation for the Services; (ii) reopen the RFP for the purpose of awarding a second contract to another Contractor in accordance with the criteria and processes set forth herein; and/or (iii) take such other actions permitted by law.
4. Public Meetings and Special Accommodations. Any meetings of the RFP evaluation committee (i.e., the Jacksonville Procurement Awards Committee or Technical Review Committee) shall be noticed on Buyer's website and shall comply with Florida's Open Meetings Laws. Please contact the Analyst if you are uncertain of Buyer's website address or if you experience problems accessing it. Persons requiring a special accommodation because of a disability should contact the Analyst identified in the Overview Section at least forty-eight (48) hours prior to the meeting.
5. Cost of Developing RFP Response. All costs related to the preparation of RFP Responses and any related activities are the sole responsibility of Contractor. Buyer assumes no liability for any costs incurred by Contractors throughout the entire selection process.
6. Response Ownership. All Responses, including attachments, supplementary materials, addenda, etc., shall become property of Buyer and shall not be returned to Contractor. Buyer will have the right to use any and all ideas or adaptation of ideas presented in any Response. Acceptance or rejection of a Response shall not affect this right.
7. Public Records Law; Process For Protecting Trade Secrets and Other Information. Article 1, Section 24, Florida Constitution, guarantees every person access to all public records, and Section 119.011, Florida Statutes, provides a broad definition of public records. As such, all responses to the RFP are public records unless exempt by law. If Contractor considers any portion of its Response to be exempt from disclosure under Florida law, Contractor must provide Buyer with a separate redacted copy of the Response and briefly describe in writing the grounds for claiming exemption from the public records law, including the specific statutory citation. Contractor shall be responsible for defending its determination that the redacted portions of its Response are confidential, trade secret or otherwise not subject to disclosure. Further, Contractor shall protect, defend, and indemnify Buyer for any and all claims arising from or relating to Contractor's determination that the redacted portions of its Response are confidential, trade secret or otherwise not subject to disclosure. If Contractor fails to submit a Redacted Copy with its Response, Buyer is authorized to produce the entire Response in answer to a public records request.

In accordance with Section 119.0701, Florida Statutes, the Contractor shall:
(a)
Keep and maintain public records required by Buyer to perform the services; and
(b)
Upon request from Buyer's custodian of public records, provide Buyer with a copy of the requested records or allow records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided for in Chapter 119, Florida Statutes, or as otherwise provided by law; and
(c)
Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Contract term and following completion of this Contract if Contractor does not transfer the records to Buyer; and
(d)
Upon completion of this Contract, transfer to Buyer at no cost all public records in possession of Contractor or keep and maintain public records required by Buyer to perform the service. If Contractor transfers all public records to Buyer upon completion of this Contract, Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If Contractor keeps and maintains public records upon completion of this Contract, Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to Buyer upon request from Buyer's custodian of public records in a format that is compatible with Buyer's information technology systems.
The above requirements apply to a "Contractor" as defined in Section, 119.0701, Florida Statutes.
IF CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE BUYER'S CUSTODIAN OF PUBLIC RECORDS AT (904) 255-7674; REQUEST@COJ.NET; BUYER OF JACKSONVILLE, PUBLIC RECORDS REQUEST, 214 N. HOGAN STREET, SUITE 1180, JACKSONVILLE, FLORIDA 32202.
8. Multiple Responses from Same Contractor; No Collusion. More than one Response from an individual firm, partnership, corporation or association under the same or different names is not permitted. Reasonable grounds for believing that a Contractor is involved in more than one Response for the same work will be cause for rejection of all Responses in which such Contractor is believed to be involved. Any or all Responses will be rejected if there is reason to believe that collusion exists between Contractors. Responses in which the prices obviously are unbalanced will be grounds for rejection.
9. Convicted Vendor List. A person or affiliate placed on the State of Florida convicted vendor list pursuant to Section 287.133, Florida Statutes, following a conviction for a public entity crime may not do any of the following for a period of 36 months from the date of being placed on the convicted vendor list:
submit a bid on a contract to provide any goods or services to a public entity;
submit a bid on a contract with a public entity for the construction or repair of a public building or public work;
submit bids on leases of real property to a public entity;
be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and
transact business with any public entity in excess of the Category Two threshold amount provided in Section 287.017, Florida Statutes.
10. Discriminatory Vendor List. An entity or affiliate placed on the State of Florida discriminatory vendor list pursuant to Section 287.134, Florida Statutes, may not:

submit a bid on a contract to provide any goods or services to a public entity;

submit a bid on a contract with a public entity for the construction or repair of a public building or public work;

submit bids on leases of real property to a public entity;

be awarded or perform work as a contractor, supplier, sub-contractor, or consultant under a contract with any public entity; or

transact business with any public entity.
11. Contractor Representations. In submitting a Response, Contractor understands, represents, and acknowledges the following (if Contractor cannot so certify to any of following, Contractor shall submit with its Response a written explanation of why it cannot do so).
Contractor currently has no delinquent obligations to the Buyer of Jacksonville or any of its independent agencies.
The Response is submitted in good faith and without any prior or future consultation or agreement with any other respondent or potential respondent;
To the best of the knowledge of the person signing the Response, neither the Contractor, its affiliates, subsidiaries, owners, partners, principals or officers:
is currently under investigation by any governmental authority for conspiracy or collusion with respect to bidding on any public contract;

is currently under suspension or debarment by any governmental authority in the United States;
has within the preceding three years been convicted of or had a civil judgment rendered against it, or is presently indicted for or otherwise criminally or civilly charged, in connection with (i) obtaining, attempting to obtain, or performing a federal, state, or local government transaction or public contract; (ii) violation of federal or state antitrust statutes; or (iii) commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; or
has within the preceding three-year period had one or more federal, state, or local government contracts terminated for cause or default.
Contractor is not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List. Pursuant to Section 287.135, Florida Statutes, the submission of a false certification may subject the company to civil penalties, attorney's fees, and/or costs. [This certification applies to contracts of $1,000,000 or more. A list of the companies can be found as a link to "PFIA Quarterly Reports" at www.sbafla.com/fsb/.]
Contractor has read and understands the RFP terms and conditions, and the Response is submitted in conformance with those terms and conditions.
All representations made by Contractor to Buyer in connection with the RFP have been made after a diligent inquiry of its employees and agents responsible for preparing, approving, or submitting the Response.
Contractor shall indemnify, defend, and hold harmless Buyer and its employees against any cost, damage, or expense which may be incurred or be caused by any error in the Response.
All information provided by, and representations made by, Contractor are material and important and may be relied upon by Buyer in awarding the Contract.
12. Provision of Services. Contractor shall provide Buyer with all of the services and deliverables described in the RFP, the Response and the resulting Contract (collectively,

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5.	**Indemnification and Insurance Requirements (Preliminary Re**		
1.	**RFP Indemnification and Insurance Requirements.**		a. Acknowledge
6.	**Sample Services Contract (Preliminary Response Stage)**		
1.	Please review and acknowledge the attached sample Professional Services Contract.		a. Acknowledge
7.	**Evaluation Criteria - Preliminary Response Stage (Prelimina**		
	Score		**0.00**
1.	**COMPETENCE** (Maximum 20 Points) Describe the firm's overall competence to provide comprehensive homestead exemption compliance services as outlined in the Scope of Services. Discuss experience in Florida with property appraiser or tax assessment offices, including demonstrated familiarity with state statutes, exemption types, and administrative procedures. Highlight relevant Florida-based engagements within the past five (5) years, identifying outcomes		a. Acknowledge
	Score		0.00
2.	**APPROACH AND WORK PLAN** (Maximum 20 Points) Explain your firm's understanding of the RFP objectives and your ability to deliver a full lifecycle solution—from application eligibility verification through ongoing monitoring, investigation, and reporting. Describe the proposed approach, including: · · Automated eligibility verification and risk scoring methods. · · Use of multiple data sources and predictive analytics to identify exemption risks. · · Procedures for investigating flagged exemptions and preparing documented evidence packages that meet Florida statutory requirements. · · Workflow collaboration and communication protocols with DCPA staff. · · Proposals should demonstrate clear alignment with DCPA's goals of improving tax roll accuracy, minimizing false positives, and maintaining fairness and transparency in taxpayer engagement.		a. Acknowledge
	Score		0.00
3.	**TECHNOLOGY PLATFORM & INTEGRATION** (Maximum 15 Points) Provide a detailed description of the proposed technology platform supporting this project. Discuss the platform's security, hosting, and maintenance features. Explain user access controls, reporting functions, dashboard features, and methods for importing/exporting data between systems. Describe how the platform will support DCPA operations without requiring		a. Acknowledge
	Score		0.00
4.	**STAFFING AND TRAINING PLAN** (Maximum 10 Points) Identify the key personnel who will be assigned to this project, their roles, and their relevant experience. Describe the staffing plan to ensure responsiveness, quality, and continuity of service. Explain the firm's training and support strategy, including initial implementation training, refresher courses, and updates when new system features or exemption		a. Acknowledge
	Score		0.00
5.	**EXPERIENCE AND REFERENCES** (Maximum 10 Points) Provide a list of comparable projects performed for property appraiser or tax offices, including the name of the jurisdiction, scope of services, contact person, and outcomes achieved. At least two (2) references from Florida-based clients are required. Narrative descriptions should include		a. Acknowledge
	Score		0.00
6.	**IMPLEMENTATION PLAN AND DELIVERABLES** (Maximum 10 Points) Describe the firm's implementation strategy for launching the compliance program. Provide an estimated project timeline that includes key milestones, staff training, platform activation, and initial reporting. Explain how deliverables such as the implementation plan, technology platform, monitoring dashboard, case files, and reports will be provided. Identify the process for monthly and quarterly reporting, as well as the Annual Program		a. Acknowledge
	Score		0.00
7.	**PARTNERSHIP AND COMMUNICATION** (Maximum 5 Points) Discuss how your firm will maintain an ongoing partnership with DCPA staff. Describe your communication methods, responsiveness standards, and commitment to aligning with DCPA workflows, reporting formats, and		a. Acknowledge
	Score		0.00
8.			a. Acknowledge

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FEE STRUCTURE AND VALUE (Maximum 10 Points) Provide a clear explanation of your proposed contingency-based pricing model, including the percentage or formula used to determine compensation based on verified revenue recovery or cost savings. Tips & Criteria: Explain how your proposal prioritizes measurable value and	10 PTS		

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Award Solicitation: Request for Proposals (RFP) Personal Exemption Compliance Services

Solicitation **RFP - Non-Construction 1716**	Responses Received **1**	Invited Suppliers **223**
Procurement BU **COJ BU**	Active Responses **1**	Will Participate **1**
Close Date **12/9/2025 16:00**	Shortlisted Responses **1**	Responded **1**
Solicitation Currency **USD**		

Lines

Number of Awarded Lines	**0**	Total Current Value		Total Savings Amount	
Number of Awarded Suppliers	**0**	Total Award Amount		Total Savings	

1 Please add $1.00

Requisitioning BU	**PAAD: Property Appraiser's Office**	Start Price		Award Amount	
Line Type	**Dollars**	Current Price	**1.00**	Savings	
Category Name	**208.53 Integrated Software**			Savings	
Location	**Yates Suite 270**				

	Target Value	**The Exemption Project, Inc Response: 455757**
Business Relationship		Spend Authorized
Supplier Site		
Response Status		Active
Shortlist Status		Included
Rank		1
Line Pricing		
Response Price		0.27
Unit Price Savings		0.73
Unit Price Savings Percent		73.00%
Minimum Release Amount		
Award Decision		
Award		No
Award Amount		
Promised Delivery Date		
Note to Buyer		
Attachments		No

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Award Solicitation: Request for Proposals (RFP) Personal Exemption Compliance Services

Solicitation **RFP - Non-Construction 171**	Responses Received **1**	Invited Suppliers **223**
Procurement BU **COJ BU**	Active Responses **1**	Will Participate **1**
Close Date **12/9/2025 16:00**	Shortlisted Responses **1**	Responded **1**
Solicitation Currency **USD**		

Requirements Scoring

Requirements

	Requirement	Acceptable Values	Score	Maximum Score
7.	**Evaluation Criteria - Preliminary Response Stage (Preliminary**			**100**
1.	**COMPETENCE** (Maximum 20 Points) Describe the firm's overall competence to provide comprehensive homestead exemption compliance services as outlined in the Scope of Services. Discuss experience in Florida with property appraiser or tax assessment offices, including demonstrated familiarity with state statutes, exemption types, and administrative procedures. Highlight relevant Florida-based engagements within the past five (5) years, identifying outcomes such as exemptions removed, revenue recovered, and operational improvements achieved.	a. Acknowledge		20
2.	**APPROACH AND WORK PLAN** (Maximum 20 Points) Explain your firm's understanding of the RFP objectives and your ability to deliver a full lifecycle solution—from application eligibility verification through ongoing monitoring, investigation, and reporting. Describe the proposed approach, including: · · Automated eligibility verification and risk scoring methods. · · Use of multiple data sources and predictive analytics to identify exemption risks. · · Procedures for investigating flagged exemptions and preparing documented evidence packages that meet Florida statutory requirements. · · Workflow collaboration and communication protocols with DCPA staff. · · Proposals should demonstrate clear alignment with DCPA's goals of improving tax roll accuracy, minimizing false positives, and maintaining fairness and transparency in taxpayer engagement.	a. Acknowledge		20
3.	**TECHNOLOGY PLATFORM & INTEGRATION** (Maximum 15 Points) Provide a detailed description of the proposed technology platform supporting this project. Discuss the platform's security, hosting, and maintenance features. Explain user access controls, reporting functions, dashboard features, and methods for importing/exporting data between systems. Describe how the platform will support DCPA operations without requiring upfront technology costs or direct integration with CAMA systems.	a. Acknowledge		15
4.	**STAFFING AND TRAINING PLAN** (Maximum 10 Points) Identify the key personnel who will be assigned to this project, their roles, and their relevant experience. Describe the staffing plan to ensure responsiveness, quality, and continuity of service. Explain the firm's training and support strategy, including initial implementation training, refresher courses, and updates when new system features or exemption rules are implemented.	a. Acknowledge		10
5.	**EXPERIENCE AND REFERENCES** (Maximum 10 Points) Provide a list of comparable projects performed for property appraiser or tax offices, including the name of the jurisdiction, scope of services, contact person, and outcomes achieved. At least two (2) references from Florida-based clients are required. Narrative descriptions should include program results such as number of exemptions corrected or removed.	a. Acknowledge		10
6.	**IMPLEMENTATION PLAN AND DELIVERABLES** (Maximum 10 Points) Describe the firm's implementation strategy for launching the compliance program. Provide an estimated project timeline that includes key milestones, staff training, platform activation, and initial reporting. Explain how deliverables such as the implementation plan, technology platform, monitoring dashboard, case files, and reports will be provided. Identify the process for monthly and quarterly reporting, as well as the Annual Program Assessment detailing overall performance, taxpayer impact, and recommendations for continuous improvement.	a. Acknowledge		10
7.	**PARTNERSHIP AND COMMUNICATION** (Maximum 5 Points) Discuss how your firm will maintain an ongoing partnership with DCPA staff. Describe your communication methods, responsiveness standards, and commitment to aligning with DCPA workflows, reporting formats, and enforcement protocols.	a. Acknowledge		5
8.	**FEE STRUCTURE AND VALUE** (Maximum 10 Points) Provide a clear explanation of your proposed contingency-based pricing model, including the percentage or formula used to determine compensation based on verified revenue recovery by the Duval County Tax Collector. Explain how your proposal provides measurable value and long-term sustainability for DCPA without upfront costs.	a. Acknowledge		10

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