4

SUBJECT: FORECLOSURE INTERVENTION PROGRAM

BID #: ESC-0312-23 **OPEN DATE:** 3/29/2023

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: EVALUATED BID – ONE (1) YEAR FROM DATE OF CONTRACT EXECUTION WITH TWO (2) ONE (1) YEAR RENEWAL OPTIONS

AGENCY: HOUSING & COMMUNITY DEVELOPMENT DIVISION

BASIS OF AWARD: UP TO FOUR (4) CONTRACTS – HIGHEST SCORES BASED ON EVALUATION CRITERIA

NUMBER OF BIDS INVITED: (6) **NUMBER RECEIVED:** (3) **OTHER:** (0)

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Request approval to ratify the period of service from May 5, 2024 through the date of the executed contract amendment.

Recommend approval to utilize the first contract renewal option with Jacksonville Area Legal Aid, Inc. in the not-to-exceed expenditure amount of $80,800.00. Total revised not-to-exceed award amount will be $186,200.00. Period of service will be from May 5, 2024 through May 4, 2025 with one (1) one-year renewal option remaining.

Request approval to revise the Performance Schedule and the Schedule of Administrative Rates per the attachments to reflect the eighty-eight (88) additional clients that would be served from this funding.

Funding for this award will be encumbered from account 11601.174107.534100.010440.00000000.00000.0000000, executed by formal contract amendment #1 through the Office of General Counsel, and processed via Purchase Order(s).

ATTACHMENTS: Recommendation Memo, Supplier's Letter, Performance Schedule, Schedule of Administrative Rates, Section 1.3 Term of Agreement, Previous Award

ANALYST: _____
DAVID KLAGES

RESPECTFULLY SUBMITTED: _____
DUSTIN FREEMAN, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: TRAVIS JEFFREY, CHIEF, HOUSING & COMMUNITY DEVELOPMENT DIVISION

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

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED _____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

City of Jacksonville, Florida

Donna Deegan, Mayor

A NEW DAY.

Neighborhoods Department
Housing Community Development Division
214 N. Hogan Street, 7th Floor
Jacksonville, Florida 32202
(904) 255-8200
www.coj.net

MEMORANDUM

DATE: **May 9, 2024**

TO: **Dustin L. Freeman, Chief, Procurement Division**
Finance and Administration Department

THRU: **Travis Jeffrey**
Chief, Housing & Community Development Division

FROM: **Robert Ownby, Property Administrator**
Housing & Community Development Division

RE: **Foreclosure Intervention Program ESC-0312-23 – Additional Funding Request**

The City of Jacksonville entered into three (3) contracts with HUD Certified Housing Counseling Agencies for counseling services for the Foreclosure Intervention Program through Procurement Award # ESC-0312-23. At this time we are requesting to exercise our first of two contract extension options for an additional one year term for the following agencies:

1. Family Foundations of Northeast Florida – Contract Number: 70417-23
2. Jacksonville Urban League – Contract Number: 70419-23
3. Jacksonville Area Legal Aid – Contract Number: 70418-23
   - In addition to the contract extension, we are also requesting additional contract funding to Jacksonville Area Legal Aid in the amount of $80,800 with a total not to exceed contract amount of $186,200. This request would also include the updating and revising of the performance schedule as well as the schedule of administrative rates within the contract to reflect the additional 88 clients that would be served from this funding.

The Accounting Code for this funding: **11601.174107.534100.010440.00000000.00000.0000000**

I appreciate your time and consideration in your review of this request. Please let me know if you have any questions or need further documentation. I may be reached at 255-8283 or ROwnby@coj.net.

Authority:
[2023-248-E]

JACKSONVILLE AREA
Legal Aid

126 W. Adams Street
Jacksonville, FL 32202

Phone 904-356-8371
Fax 904-356-8285
www.jaxlegalaid.org

May 7, 2024

Robert Ownby
Housing Property Administrator
City of Jacksonville/Neighborhoods Department
214 N. Hogan Street, 7th Floor
Jacksonville, FL 32202

Re: Foreclosure Intervention Program ESC-0313-20

Dear Robert:

We are submitting a request to extend the contract for the Jacksonville Area Legal Aid (JALA) Foreclosure Intervention Program for one more year. In addition to the extension, we are seeking additional funding for the contract. As of now, there is a remaining balance of $24,600 from the current contract. We are proposing an additional funding of $80,800 to bring the total contract funding back to the original award amount of $105,400.

During the first quarter of 2024, there has been a notable increase in the number of families receiving services under this contract. If this upward trend continues, there is a possibility that our funding allocated for this contract may be depleted before its expiration. Therefore, it is anticipated that additional funding may be required beyond the current request. Furthermore, based on a thorough examination of our expenses, in the upcoming months, we plan to seek reimbursement for our actual costs, totaling $1200.00 for Level 1 and Level 2 services.

Thank you for your consideration.

Sincerely,

James A. Kovalski, Jr.
President and CEO

Jacksonville Area Legal Aid, Inc is proudly supported by

United Way of Northeast Florida

REVISED **Performance Schedule.** Contractor and the City have jointly established the following performance schedule for the Services (the "**Performance Schedule**"). Contractor shall timely perform its obligations pursuant to the Performance Schedule. The Performance Schedule shall not be modified without the prior written consent of the City (which may be withheld in its sole discretion).

REVISED PERFORMANCE SCHEDULE

Six (6) Months from the Contract Effective Date	Expenditure of **One-Half (1/2)** of the approved funding amount and provision of Level I Services to **Fifty-Six (56) clients**, and Level II Services to **Fifty-One (51) clients.**
Contract Term Date	Expenditure of the **total** approved funding amount and provision of Level I Services to a total of **Two Hundred (200 clients)** and Level II Services to a total of **One Hundred Sixty Four (164) clients.**

REVISED SCHEDULE OF ADMINISTRATIVE RATES

1. **Level I Services – (Minimum Services)**
    a. Client intake, document intake, and income certification.
    b. Interpreting loan documents.
    c. Reviewing case files.
    d. Providing advice on foreclosure rights and options.
    e. Negotiation with servicers/lenders.
    f. Assisting with nullifying rescue scams.
    g. Preparing documents for non-civil litigation purposes.
    h. In judicial foreclosures, assistance prior to foreclosure filing.
    i. Non-court related mediation procedures.
    j. Housing/Financial counseling.
    k. Optional - (Additional services determined by respondent).

Total Level I Services: 200 clients x $400.00 per client rate = $80,000.00

2. **Level II Services – (Minimum Services)**
    a. Completion of Level I services.
    b. Proof of homeowner's completion of Budget, Credit and Debt Reduction course.
    c. Homeowner assistance to bring mortgage current prior to foreclosure proceedings.
    d. Refinancing (modifying) adjustable rate or interest only mortgages to a fixed rate mortgage.
    e. Refinancing (modifying) fixed rate mortgage.
    f. Optional - (Additional services determined by respondent).

Total Level II Services: 164 clients x $600.00 per client rate = $98,400.00

TOTAL CONTRACT AMOUNT: $186,200.00

1.3 **Term of Agreement.**
The initial Term of Agreement will commence upon execution of the Contract and will continue for a **one (1)** year period. Buyer will have the option to renew such agreement for up to **two (2)** additional **one (1)** year terms upon satisfactory performance by Contractor. The Contract is subject to early termination as set forth elsewhere in this RFP.

1.4 **Minimum Requirements for Contractors.**
Contractors must satisfy the following mandatory minimum requirements in order to have their Responses evaluated. By submitting a Response, Contractor warrants and represents that it satisfies these requirements. Failure to meet these requirements will result in the Response not being evaluated and being rejected as non-responsive:

1. Contractor is required to be a §501(c)(3) non-profit organization authorized to conduct business and in good standing in the State of Florida.

2. Contractor must possess a current U.S. Department of Housing and Urban Development (HUD) certification as an approved counseling agency. All individual housing counselors employed by the Contractor must also possess a current HUD certification as an approved housing counselor.

   Local Housing Assistance Plan (LHAP):
   Eligible sponsors must be a HUD-Approved Housing Counseling Agency as evidenced by the following criteria:

   - Certified as a HUD-Approved Counseling Agency.
   - Each staff member responsible for counseling is certified as a Housing Counselor by the National Foundation of Credit Counseling (NFCC) or NeighborhoodWorks.
   - Each staff member responsible for counseling has been certified and served as a practitioner for a minimum of one (1) year.
   - Use of nationally recognized standards and curriculum.

3. The Contractor must have a minimum of two (2) years of experience in the delivery of foreclosure intervention and delinquency resolution services.

4. Any premises used for counseling services must be accessible to all persons, including persons with disabilities. The facility must be open/able to give private counseling sessions and ensure client privacy.

1.5 **Equal Business Opportunity Program.**
It is an official policy of the City of Jacksonville to encourage the maximum participation of Jacksonville Small and Emerging Businesses (JSEBs) in its contract awards based upon availability. To participate as a JSEB on Buyer projects, a company must be certified as a JSEB with the City's Equal Business Opportunity Office.

This RFP and the resulting Contract are subject to requirements of the "Encouragement Plan," which is fully described on Attachment C to this RFP.

Contractors may contact Buyer's Equal Business Opportunity Office at (904) 255-8840 or find the JSEB directory on Buyer's website. Please contact the Contact Person identified in Section 1.12 if you are uncertain of Buyer's website address or if you experience problems accessing it.

1.6 **Documents Available for Inspection.**
N/A.

SUBJECT: FORECLOSURE INTERVENTION PROGRAM

BID #: ESC-0312-23

OPEN DATE: 3/29/2023

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: EVALUATED BID – ONE (1) YEAR FROM DATE OF CONTRACT EXECUTION WITH TWO (2) ONE (1) YEAR RENEWAL OPTIONS

AGENCY: HOUSING & COMMUNITY DEVELOPMENT DIVISION

BASIS OF AWARD: UP TO FOUR (4) CONTRACTS – HIGHEST SCORES BASED ON EVALUATION CRITERIA

NUMBER OF BIDS INVITED: (6) **NUMBER RECEIVED:** (3) **OTHER:** (0)

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Subject RFP closed on March 29, 2023 with three (3) responses received. Family Foundations of Northeast Florida, Inc. submitted a proposal utilizing *Form 1 – Price Sheet* from the previous solicitation (ESC-0313-20). The using agency believes the price sheet submitted by Family Foundations of Northeast Florida, Inc. offers no competitive advantage; therefore, recommend approval to waive the price sheet submitted by Family Foundations of Northeast Florida, Inc. as a minor irregularity.

Recommend approval of award to all three (3) responding firms listed below in alphabetical as well as ranking order.

Firm	Average Points	Rank
Family Foundations of Northeast Florida, Inc.	95.67	1
Jacksonville Legal Aid, Inc.	89.00	2
Jacksonville Urban League	68.86	3

Funding for this award will be allocated in the initial not-to-exceed award amounts as follows:

- Family Foundations of Northeast Florida, Inc.: $28,000.00
- Jacksonville Legal Aid, Inc.: $105,400.00
- Jacksonville Urban League: $26,000.00

Total not-to-exceed award amount will be $159,400.00. Period of service will be one (1) year from the date of executed contract with two (2) one (1) year renewal options.

Funding for this award will be encumbered from account 11601.174107.534100.010440.00000000.00000.0000000, executed by formal contracts through the Office of General Counsel, and processed via individual Purchase Orders.

ATTACHMENTS: Recommendation Memo, Evaluation Matrix, Responsiveness Review, Sections 1.3 and 2.6, Form 1 – Price Sheets

ANALYST: _____
DAVID KLAGES

RESPECTFULLY SUBMITTED: _____
DUSTIN FREEMAN, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: TRAVIS JEFFREY, INTERIM CHIEF, HOUSING & COMMUNITY DEVELOPMENT DIVISION

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

MEMBERS APPROVING 5 MEMBERS DISAPPROVING 0 DATE 4/20/2023

OTHER _____

ACTION OF AWARDING AUTHORITY DATE 4/21/23

APPROVED ✓ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

Brian Hughes
Chief Administrative Officer
For: Mayor Lenny Curry
Under Authority of:
Executive Order No: 2019-02