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SINGLE SOURCE AWARD **BID # SS-14434-23**

Subject: SOFTWARE MAINTENANCE AND SUPPORT FOR VAB AXIA COMPUTER SOLUTIONS (VALUE ADJUSTMENT BOARD'S RECORDS MANAGEMENT AND SCHEDULING SYSTEM)

Department: JACKSONVILLE CITY COUNCIL

Description of Purchase:
Recommend approval of a Single Source award to Pioneer Technology Group, LLC. for software maintenance and support for VAB Axia Computer Solutions for the Jacksonville City Council. Period of service is for three (3) years from October 1, 2023 through September 30, 2026. Total award expenditure amount not-to-exceed $69,300.00 ($23,100.00/year).

Funding Source: This award is subject to appropriation by the City in the fiscal year beginning October 1, 2023. No funds have been appropriated to date. The City has no obligation for payment and work hereunder is not authorized unless funds are appropriated for work herein. A written notification will be provided in the event the funds are appropriated.

Single Source Award To: Pioneer Technology Group, LLC

Price Justification: See attachment

Total Award: $69,300.00 **Requisition #:** CCSS-500156-23

Attachments: Agency Memo, Single Source Form, Supplier Quote

Certification as to Single Source: Margret M. Sidman, Director/Council Secretary

THE ABOVE PURCHASE IS RECOMMENDED FOR AWARD IN ACCORDANCE WITH CHAPTER 126.206.

Analyst: Olive Wallace-Cohen

Dustin Freeman, Chief
Procurement Division

APPROVAL OF GENERAL GOVERNMENT AWARDS COMMITTEE

"ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS"

CHAIRMAN ***DATE***

ACTION OF AWARDING AUTHORITY DATE: _____

APPROVED_____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

FORM GB-113, Revised 12/2007

MARGARET M. "PEGGY" SIDMAN
Director/Council Secretary
Office (904) 255-5133
Fax (904) 255-5230
E-Mail: SIDMANP@COJ.NET

117 West Duval Street
City Hall, Suite 425
Jacksonville, FL 32202

July 19, 2023

MEMORANDUM

TO: Dustin Freeman
Procurement Division

FR: Margaret M. Sidman, Director / Council Secretary
Jacksonville City Council

RE: **Pioneer Technology Group, provider of Axia, Single Source Request FY 2023-2026**

Pursuant to Chapter 126 of the Ordinance Code, the City Council solicits the approval of the contract award for single source services for a software maintenance agreement for Axia computer solutions. This award is subject to appropriation by the City Council in the fiscal year beginning October 1, 2023. The award is for $69,300.00, of which the Duval County School Board, under the Florida Statutes, must reimburse two-fifths of all Value Adjustment Board (VAB) expenditures at the end of the year.

Pioneer Technology Group implemented Axia, a records management system, for VAB to assist in maintaining records and generating reports per the COJ's Cash Handling Procedures, Public Records laws, and Department of Revenue reporting requirements. VAB is a "mandated" function of local governments pursuant to Florida Statues (Chapter 194). VAB reviews appeals from decisions made by the Duval County Property Appraiser, and its jurisdiction includes appeals of property value assessments, exemption denials, agriculture (greenbelt) classification denials, and portability appeals, among others.

The Axia software/system handles the online petition filing process, the complexities of Special Magistrate scheduling, provides a communications platform with petitioners both before and after the hearing, and the Interchange of information between the Property Appraiser's Office, the Tax Collector, and VAB Office. Axia has dramatically eased the VAB process and has ensured that statutory deadlines are met appropriately. Further, the Axia system has built-in flexibility to accommodate differences among individual customer operations. The system generates all state-required forms and has been approved for County use by the Department of Revenue.

We appreciate your favorable consideration in approving the Pioneer Technology Group, provider of Axia, Single Source request as the provider for continuing software maintenance services for the VAB for FY2023-2026.

Please contact Heather Pelegrin, Assistant Chief - Value Adjustment Board, at 904.255.5177 or Margaret M. Sidman, Director/Council Secretary-Jacksonville City Council at 904.255.5133, for additional information and correspondence.

Thank you for your consideration in this matter.

JUSTIFICATION FOR SINGLE SOURCE (JSS)	
Pursuant to the City of Jacksonville Procurement Code§ 126.206 & § 126.312, when requesting a purchase from a vendor subject to the referenced sections, please complete this form to justify your request and submit to Procurement with applicable attachments.	
1. Requesting Agency:	Office of the City Council
2. Nature and/or description of the requirement being requested. ***Identify each item, component or service being procured. (Attach quote/proposal):*** ***Why does the City need these particular goods or services?***	The request is for continuation of a software maintenance services agreement for the Value Adjustment Board's records management and scheduling system, Axia.
3. Provide a detailed justification as to why the requested goods/services can only be efficiently and effectively procured through the recommended Single Source vendor:	The Axia software/system handles the online petition fling process, the complexities of Special Magistrate scheduling, provides a communications platform with petitioners both before and after the hearing, and the interchange of information between the Property Appraiser's Office, the Tax Collector and VAB Office. Axia has greatly eased the VAB process and has ensured that statutory deadlines are met appropriately. Further, the Axia system has built-in flexibility to accommodate slight differences among individual customer's operations. The system generates all state-required forms and has been approved for County use by the Department of Revenue.
4. Date of Request	7/27/2023

5. Summary of Market Research

[Provide a description of the market research performed, how it was performed, by whom, and market research results. Please spell out acronyms.]

[The VAB staff researched "advanced computer software" specifically for property tax appeals management within the state. Staff polled various Florida counties that had purchased AXIA specifically for VAB records management. After participating in a demonstration by AXIA, staff were confident the system features, both functional and design, met the requirements (including accepting alternative forms of payment and robust auditing features). The Axia product, by Pioneer Technology Group (Pioneer), is the only software that has been created specifically for the Florida Value

Adjustment Board process and is currently being utilized in 22 Florida counties. With the current implementation of Miami-Dade County, all the large and mid-volume counties in the state are using Axia for property tax appeals management.]

6. ***Other Documentation (Check and attach all that apply)***

√ Supplier Quote

√ Single Source Memo signed by Director

☐ Other [Click here to list other documentation.]

Pioneer TECHNOLOGY GROUP
A DIVISION OF CATALIS™ COURTS & LAND RECORDS, LLC

Renewal Notice #EST4130

Catalis Court & Land
(formerly Pioneer Technology Group, LLC)
3025 Windward Plaza
Fairways I, Suite 200
Alpharetta GA 30005
United States

3/23/2023

Bill To

City of Jacksonville, FL
Attn: Kale Newsome
Accounts Payable Supervisor
117 West Duval Street, Suite 375
Jacksonville FL 32202
United States

TOTAL

$69,300.00

Expires: 4/22/2023

To Be Billed On	Sales Rep	Renewal Start Date	Renewal End Date
10/1/2023	Tina Harvey	10/1/2023	9/30/2026

Qty	Item	Rate	Amount
1	**PTG_Software Maintenance_Axia** Axia Annual Software Maintenance 10/2023 through 09/2024	$23,100.00	$23,100.00
1	**PTG_Software Maintenance_Axia** Axia Annual Software Maintenance 10/2024 through 09/2025	$23,100.00	$23,100.00
1	**PTG_Software Maintenance_Axia** Axia Annual Software Maintenance 10/2025 through 09/2026	$23,100.00	$23,100.00

Subtotal	$69,300.00
Total	$69,300.00

EST4130

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A DIVISION OF CATALIS™ COURTS & LAND RECORDS, LLC

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Catalis Court & Land
(formerly Pioneer Technology Group, LLC)
3025 Windward Plaza
Fairways I, Suite 200
Alpharetta GA 30005
United States

3/23/2023

This is not an invoice. Payment is not due at this time.

The software subscription/maintenance agreement is renewing soon and we are providing this quote with the renewal rates for your information.

An invoice for the above services will be generated and sent to you on the start date listed above, unless we've otherwise heard from you, notifying us of any changes.

Thank you for your continued business.

EST4130