2

SUBJECT: **Foreclosure Intervention Program**

BID #: ESC-0313-20

OPEN DATE: 1/15/2020

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: Service Contract – One (1) year from date of contract execution

AGENCY: Neighborhoods

BASIS OF AWARD: Highest Scoring Bidder Based on Evaluation Criteria

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

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to amend the award to Jacksonville Area Legal Aide, Inc to increase administrative rates as listed below. This is to reflect the rising operational costs associated with the contract. The total revised funding to remain $45,000.00. All other terms and conditions remain the same.

	Current Rate	Requested Increase
Level 1-	$200.00	$400.00
Level 2-	$400.00	$600.00

Funding Source: 11601.174107.583010.000000.00001342.00000.0000000- to be executed by formal contract amendment through the Office of General Counsel

Attachments: Recommendation Memo, Vendor Memo, and Previous Awards

ANALYST: _____ Jaclyn Stamos **RESPECTFULLY SUBMITTED** _____
GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: Thomas J. Daly, II, Chief, Housing and Community Development

(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 _____

City of Jacksonville, Florida

Lenny Curry, Mayor

Neighborhoods Department
Ed Ball Building
214 N. Hogan Street, 7th Floor
Jacksonville, FL 32202
(904) 255-8200

ONE CITY. ONE JACKSONVILLE.

MEMORANDUM

DATE: **June 14, 2022**

TO: **Greg Pease, Chief, Procurement Division**
Finance and Administration Department

THRU: **Thomas J. Daly, II, Esq.**
Chief, Housing & Community Development Division

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

RE: **Foreclosure Intervention Program ESC-0313-20 – Contract Amendment Request**

The City of Jacksonville entered into contract with Jacksonville Area Legal Aid "JALA" for counseling services for the Foreclosure Intervention through the procurement approval #ESC-0313-20. On April 8, 2022 the Competitive Sealed Proposal Evaluation Committee recommend approval for a one year contract extension.

Per the attached memo JALA is requesting the following:

- An amendment to the contract to increase their Administrative Rates for the amounts paid per client served for Level I and Level II services provided. JALA's Administrative Rates where set by the proposal that they submitted in January 2020. Since then JALA has experienced rising costs that have resulted in the program operating at a net loss. No additional program funding is being requested at this time.

Current Rate	Requested Increase
Level I - $200	Level I - $400
Level 2 - $400	Level II - $600

- This request would require the revision of the Performance Schedule within Attachment A of the contract as well as the revision to Attachment B-1, Schedule of Administrative Rates.

The Accounting Code for this funding: **11601.174107.583010.000000.00001342.00000.0000000**

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:
[2019-022]
[2019-284]

CC: Annette Leslie-Burney, Manager of Purchasing Services – Procurement Division

Jacksonville Area Legal Aid, Inc.

A *Wealth of Justice* for Those Who Have Neither

❑ 222 San Marco Avenue
St. Augustine, FL 32084
(904) 827-9921
FAX: (904) 827-9978
Toll Free: 1-877-827-9921

✓126 W. Adams Street
Jacksonville, FL 32202-3849
(904) 356-8371
FAX: (904) 356-8285
Toll Free: 1-866-356-8371

❑ 825 N. Orange Avenue, Rm 308
Green Cove Springs, FL 32043
(904) 284:8410
FAX: (904) 284-8485
Toll Free: 1-866-284-8410

June 7, 2022

Robert Ownby
Housing Property Administrator
City of Jacksonville
Neighborhoods Department
214 N. Hogan Street, 7th floor
Jacksonville, Florida 32202

Re: Foreclosure Intervention Program – Contract Amendment Request

Dear Robert:

As we discussed, overall costs have resulted in JALA handling the current Foreclosure Intervention Program at a net loss. As a 501(c)(3), we do not look to make a profit off the program, but we hope to continue participation without losing money. Therefore, we are requesting an amendment to the contract dated April 26, 2021 between the City of Jacksonville and Jacksonville Area Legal Aid, Inc for the Foreclosure Intervention Program. We are requesting an increase in the amount paid for Level 1 and Level 2 services as outlined in attachment B-1, Schedule of Administrative Rates.

Justification:

In 2021, we incurred an additional $4,450.00 in staff salary, fringe and direct costs over the amount we were able to bill based on our current contract. This is a loss of approximately $370 *per homeowner* - homeowners we served and assisted in avoiding foreclosure. The reason for this shortfall is two-fold: (1) more staff time required to serve families under this grant than originally anticipated, due in part to the increasing complexity of mortgage mitigation, and (2) the increase in salary, fringe and direct costs over the last 24 months due to COVID-19 and inflation. The proposed increase will cover our costs for the clients we serve for the remainder of the contract. We understand this does not increase our overall award amount of $45,000.

Current contract
Level 1 - $200
Level 2 - $400

Proposed Increase
Level 1 - $400 (maximum 39 clients)
Level 2 - $600 (maximum 39 clients)

We are happy to provide any additional support needed, and we appreciate your consideration of this request.

Sincerely,

James A. Kowalski Jr.

PROPOSED 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 1 Services to **20 clients**, and Level II Services to **20 clients**
Contract Term Date	Expenditure of the **total** approved funding amount and provision of Level 1 Services to a total of **39 clients** and Level II Services to a total of **39 clients**

PROPOSED SCHEDULE OF ADMINISTRATIVE RATES REFLECTING THE REMAINING AVAILABLE FUNDING

1. **Level I Services – (Minimum Services)**
    a. Interpreting loan documents
    b. Reviewing case files
    c. Providing advice on foreclosure rights and options
    d. Negotiation with servicers/lenders
    e. Assisting with nullifying rescue scams
    f. Preparing documents for non-civil litigation purposes
    g. In judicial foreclosures – assistance prior to foreclosure filing
    h. Non-court related mediation procedures
    i. Housing/financial counseling
    j. Completion of required Budget/Debt/Credit Reduction Course
    k. Optional - (additional services as determined by Contractor)

Level I – (Maximum of 39 clients) x ($400.00 per client) = total service cost $15,600.00

2. **Level II Services – (Minimum Services)**
    a. Completion of Level I Services
    b. Homeowner assistance to bring mortgage current
    c. Modifying adjustable rate or interest only mortgages to a fixed rate mortgage
    d. Optional - (additional services as determined by Contractor)

Level II – (Maximum of 39 Level II clients) x ($600 per client) = total service cost $23,400.00

SUBJECT: **Foreclosure Intervention Program**

BID #: ESC-0313-20

OPEN DATE: 1/15/2020

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: Service Contract – One (1) year from date of contract execution

AGENCY: Neighborhoods

BASIS OF AWARD: Highest Scoring Bidder Based on Evaluation Criteria

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

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to amend the award to include the approval for an updated and revised Performance Schedule within Attachment A of the contract for St. John's Housing Partnership. This is to reflect the previously approved additional clients that will be served with the new funding provided. All other terms and conditions remain the same.

Funding Source: 11601.174107.583010.000000.00001342.00000.0000000- to be executed by formal contract amendment through the Office of General Counsel

Attachments: Recommendation Memo, Contract Attachments, Previous Award

ANALYST: _____ Ruben Ola

RESPECTFULLY SUBMITTED _____ GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Thomas J. Daly, II, Chief, Housing and Community Development

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

MEMBERS APPROVING 5 MEMBERS DISAPPROVING 0 DATE: 5/12/2022

OTHER: _____

ACTION OF AWARDING AUTHORITY DATE 5-13-2022

APPROVED ✓ DISAPPROVED _____

OTHER _____

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

SUBJECT: Foreclosure Intervention Program

BID #: ESC-0313-20

OPEN DATE: 1/15/2020

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: Service Contract – One (1) year from date of contract execution

AGENCY: Neighborhoods

BASIS OF AWARD: Highest Scoring Bidder Based on Evaluation Criteria

NUMBER OF BIDS INVITED: 6 NUMBER RECEIVED: 3 OTHER: 0

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval of award to the three (3) highest scoring bidders: Jacksonville Urban League, St. Johns Housing Partnership, Inc. and Jacksonville Area legal Aide, Inc., as outlined below. Recommend approval to waive as a minor irregularity missing addendum #3 for St. Johns Housing Partnership, Inc. The addendum has been received. Period of service is for one (1) year from date of contract execution. Total expenditure amount not to exceed $146,000.00.

1	Jacksonville Area Legal Aide, Inc.	95.17	$ 45,000.00
2	Jacksonville Urban League	90.33	$ 32,000.00
3	St. Johns Housing Partnership, Inc.	89.10	$ 69,000.00

Funding Source: ERCD1N1FR-08301 – To be executed by formal contract through the Office of General Counsel

Attachments: Recommendation Memo, Tabulation and Scoring Sheet and Evaluation Criteria

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

CONCURRENCE BY: Thomas J. Daly, II, Chief, Housing and Community Development

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

MEMBERS APPROVING 5 MEMBERS DISAPPROVING Ø DATE: 3/5/20

OTHER:

ACTION OF AWARDING AUTHORITY DATE 3/6/20

APPROVED ✓ DISAPPROVED

OTHER

SIGNATURE OF AUTHENTICATION

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

SUBJECT: Foreclosure Intervention Program

BID #: ESC-0313-20

OPEN DATE: 1/15/2020

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: Service Contract – One (1) year from date of contract execution

AGENCY: Neighborhoods

BASIS OF AWARD: Highest Scoring Bidder Based on Evaluation Criteria

NUMBER OF BIDS INVITED: 6 NUMBER RECEIVED: 3 OTHER: 0

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to extend the award for twelve (12) months with the contractors listed below and to increase the amount for St. Johns Housing Partnership by $32,000.00 in order to continue providing foreclosure counseling and intervention services. Total expenditure amount not to exceed $178,000.00.

1	Jacksonville Area Legal Aide, Inc.	$45,000.00		$ 45,000.00
2	Jacksonville Urban League	$32,000.00		$ 32,000.00
3	St. Johns Housing Partnership, Inc.	$69,000.00	$32,000.00	$ 101,000.00

Funding Source: 11601.174107.583010.000000.00001342.00000.0000000- to be executed by formal contract amendment through the Office of General Counsel

Attachments: Recommendation Memo, Vendor Letters and Previous Award

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

CONCURRENCE BY: Thomas J. Daly, II, Chief, Housing and Community Development

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

MEMBERS APPROVING 5 MEMBERS DISAPPROVING 0 DATE: 4/7/2022

OTHER:

ACTION OF AWARDING AUTHORITY DATE 4/8/2022

APPROVED ✓ DISAPPROVED

OTHER

SIGNATURE OF AUTHENTICATION

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