3

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 – Thirty-six (36) months from date of contract execution with three (3) one (1) year renewal options

AGENCY: Clerk of the Circuit Court

BASIS OF AWARD: Highest Scoring Bidder Based on Evaluation Criteria

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

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to ratify the period of service from October 1, 2023 through date of award.
Recommend approval to utilize the second of three (3) one (1) year renewal options with Pioneer Technology Group for the Tax Deed Application and Services. Period of service will be from date of award through September 30, 2024, with one (1) year renewal option remaining. The requested annual expenditure not to exceed $28,000.00. The revised total award expenditure not to exceed $351,785.00.

Funding Source: 00192.311002.546620.000000.00000000.00000.0000000, to be executed by formal contract amendment no. 3 (City Contract No. 10759) through the Office of General Counsel.

Attachments: Recommendation Memo, Supplier Quote/Invoice, Previous Awards

ANALYST: _____ RUBEN OLA **RESPECTFULLY SUBMITTED** _____ DUSTIN FREEMAN, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: **Jennifer Spinelli, Chief Financial Officer, Clerk of the Circuit Court**

(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 _____

JODY PHILLIPS
CLERK OF THE CIRCUIT COURT
DUVAL COUNTY, FLORIDA

October 11, 2023

To: Dustin Freeman, Chief of Procurement

Thru: Jennifer Spinelli, Chief Financial Officer

From: Victoria Tomlin, Purchasing Specialist

Subject: Addendum to Increase Contract 10759 – Pioneer Technology Group, LLC

The Clerk of the Circuit and County Courts is requesting an addendum to increase the total expenditure of contract 10759 between the City of Jacksonville and Pioneer Technology Group, LLC to provide support and maintenance for their Tax Deed Application and Services. This will be the second of three one-year renewals stated in the contract. The increase shall be by $28,000.00 and will be encumbered using funding source 00192.311002.546620.000000.00000000.00000.0000000. The total expenditure is not to exceed $351,785.00.

Attached: City Contract Number 10759

Pricing Sheet for Maintenance

Invoice

#INV308305623

PO#

Invoice Date 9/30/2023

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

Bill To

Duval County Clerk of the Circuit
501 W Adams St Ste 2338
Jacksonville FL 32202-4628
United States

TOTAL

$28,000.00

Due Date: 10/30/2023

Terms	Due Date
Net 30	10/30/2023

Quantity	Rate	Item	Amount
1	$28,000.00	**PTG_Software Maintenance_TaxSmart** Taxsmart Annual Software Maintenance 06/2023 through 05/2024	$28,000.00

Please make checks payable to Catalis Courts & Land & remit payment to:

Catalis LLC
Attn: Catalis Courts & Land Accounts Receivable
P.O. Box 25477
Tampa, FL 33622

For questions, please contact Catalis at billing@catalisgov.com

Subtotal	$28,000.00
Tax	$0.00
Total	$28,000.00

INV308305623

Invoice

#INV308305623

PO#

Invoice Date 9/30/2023

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

Amount Paid	$0.00
Balance Due	$28,000.00

INV308305623

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 – Thirty-six (36) months from date of contract execution with three (3) one (1) year renewal options

AGENCY: Clerk of the Circuit & County Courts

BASIS OF AWARD: Highest Scoring Bidder Based on Evaluation Criteria

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

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:

Recommend approval to utilize the first of three (3) one (1) year renewal options with Pioneer Technology Group for the Tax Deed Application and Services. Period of service will be October 1, 2022 through September 30, 2023, with two (2) one (1) year renewal options remaining. The requested annual expenditure not to exceed $28,000.00. The revised total award expenditure not to exceed $323,785.00.

Funding Source: 00192.311002.546620.000000.00000000.00000.0000000, to be executed by formal contract amendment (City Contract No. 10759) through the Office of General Counsel.

This award is subject to appropriation by the City in the fiscal year beginning October 1, 2022. 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 the work herein. A written notification will be provided in the event that funds are appropriated.

Attachments: Recommendation Memo, Change Request Form, Previous Award

ANALYST: _____ **RESPECTFULLY SUBMITTED** _____

RUBEN OLA

GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: Jennifer Spinelli, Chief Financial Officer, Clerk of the Circuit & County Courts

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)

ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING 0 DATE: 8/18/2022

OTHER: _____

ACTION OF AWARDING AUTHORITY DATE 8/18/2022

APPROVED ✓ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

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

SUBJECT: 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 – Thirty-six (36) months from date of contract execution with three (3) one (1) year renewal options

AGENCY: Clerk of the Circuit & County Courts

BASIS OF AWARD: Highest Scoring Bidder Based on Evaluation Criteria

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

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:

Recommend approval to increase the contract award with Pioneer Technology Group in the amount of $21,000.00 for the modifications and customization to the originally procured software solutions. Modifications are search by sale status functions, addition of reasons for rejecting the approval queue, creation of a new case type (miscellaneous), a check request search feature, the ability to send the online auction provider results after bills are receipted, and the need for in person support upon implementation of the changes. Period of service will remain the same until September 30, 2022, with three (3) one (1) year renewal options. The revised total contract expenditure not to exceed $295,765.00.

Funding Source: 00192.311002.565220.000000.00000000.00000.0000000, to be executed by formal contract amendment (City Contract No. 10759) through the Office of General Counsel.

Attachments: Recommendation Memo, Change Request Form, Previous Award

ANALYST: _____ RUBEN OLA

RESPECTFULLY SUBMITTED _____ GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Jennifer Spinelli, Chief Financial Officer, Clerk of the Circuit & County Courts

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)

ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING 0 DATE 5/20/2021

OTHER: _____

ACTION OF AWARDING AUTHORITY DATE 5/20/21

APPROVED ✓ BH DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____ Chief Administrative Officer

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 Thirty-six (36) months from date of contract execution with three (3) one (1) year renewal options

AGENCY: Clerk of the Courts

BASIS OF AWARD: Highest Scoring Bidder Based on Evaluation Criteria

200321

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

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Demonstration and oral interview conducted with the sole highest scoring vendor was completed January 8, 2019 Recommend approval of award to the highest scoring bidder, Pioneer Technology Group Period of service is thirty-six (36) months from date of contract execution with three (3) one (1) year renewal options Total estimated expenditure amount not to exceed $274,785.00

Respondent	Evaluation Score	Demonstration Score	Total Combined Score
Pioneer Technology Group	89.67	102.67	192.34

Funding Source. CLCL018-08427 – To be executed by formal contract through the Office of General Counsel

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

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

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

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

MEMBERS APPROVING 5 MEMBERS DISAPPROVING Ø DATE: 1/31/19

OTHER:

ACTION OF AWARDING AUTHORITY DATE 1/31/19

APPROVED DISAPPROVED

OTHER

SIGNATURE OF AUTHENTICATION

Sam E. Mouna
Chief Administrative Officer
For Mayor Ken Curtis
Chief Authority of
Executive Order No. 2015-05