SUBJECT: PERSONAL EXEMPTIONS AUDIT SERVICE FOR THE DUVAL COUNTY PROPERTY APPRAISER

BID #: ESC-0277-22

OPEN DATE: 11/10/2021

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: EVALUATED BID – ONE (1) YEAR FROM DATE OF CONTRACT EXECUTION WITH FOUR (4) ONE (1) YEAR RENEWAL OPTIONS

AGENCY: DUVAL COUNTY PROPERTY APPRAISER

BASIS OF AWARD: HIGHEST SCORE BASED ON EVALUATION CRITERIA

NUMBER OF BIDS INVITED: (6) **NUMBER RECEIVED:** (1) **OTHER:** (1)

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Subject RFP was opened on 11/10/21 with one (1) response received (from Deckard Technologies, Inc.).

Recommend approval of award to the only responding firm, Deckard Technologies, Inc. This is a revenue generating project with the awarded supplier receiving 25% of the fees collected. Period of service will be one (1) year from date of contract execution with four (4) one (1) year renewal options.

This award shall be executed by formal contract agreement through the Office of General Counsel.

ATTACHMENTS: Recommendation Memo, ITD Approval, Evaluation Scoring Matrix, Attachment B, Section 1.3, Previous Award

ANALYST: _____
DAVID KLAGES

RESPECTFULLY SUBMITTED: _____
GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: Kathleen Collins, Chief Financial Officer, Duval County Property Appraiser's Office

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(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 _____

OFFICE OF THE PROPERTY APPRAISER

JERRY HOLLAND
DUVAL COUNTY
PROPERTY APPRAISER

231 E. FORSYTH STREET
JACKSONVILLE, FL 32202
(904) 255-5900

November 18, 2021

Gregory Pease, Division Chief Procurement Division
214 N. Hogan Street, Suite 800
Jacksonville, Florida 32202

RE: RFP ESC-0277-22

Dear Greg:

Subject RFP was opened on November 10, 2021, with one response received (from Deckard Technologies, Inc.). This is a specialized service and even though only one response was received, the Duval County Property Appraiser's Office sees no advantage to reissuing the solicitation and we therefor recommend moving forward with Deckard Technologies, Inc at their proposed rate.

If you have any additional questions, please contact me at the telephone number or E-mail listed below.

Sincerely,

Kathleen Collins, Chief Financial Officer
Duval County Property Appraiser
904-255-5890 / kathleenc@coj.net

Klages, David

From: Galley, Craig
Sent: Thursday, November 18, 2021 2:13 PM
To: Klages, David; Brown, Elizabeth
Cc: Collins, Kathleen; Lathrop, Kenneth; Gupta, Mamta
Subject: RE: Review of Bid Document: Personal Exemptions Audit Service for the Duval County Property Appraiser

Hi David,

I reviewed the attached and see no issues as they perform their data analysis externally.

Thanks,

Craig Galley
Information Security Officer
City of Jacksonville | Finance & Administration | Information Technologies Division
214 N. Hogan St.
Jacksonville, FL 32202
Office: 904.255.8061
Cell: 904.510.4298
www.coj.net

From: Klages, David <DKlages@coj.net>
Sent: Thursday, November 18, 2021 1:28 PM
To: Brown, Elizabeth <ElizabethB@coj.net>; Galley, Craig <CGalley@coj.net>
Cc: Collins, Kathleen <KathleenC@coj.net>; Lathrop, Kenneth <LATHROP@coj.net>; Gupta, Mamta <MGupta@coj.net>
Subject: RE: Review of Bid Document: Personal Exemptions Audit Service for the Duval County Property Appraiser

Elizabeth,
Please see below and attached... This is the one response we received and the agency would like to move forward with a recommendation to award the solicitation to them. Would you please let me know if you have any concerns with that?

Thank you,

David R. Klages
Purchasing Analyst
City of Jacksonville, Procurement Division
214 N. Hogan Street, Suite 800
Jacksonville, FL 32202
Phone: (904) 255 – 8813
Email: dklages@coj.net

CITY OF JACKSONVILLE

From: Brown, Elizabeth <ElizabethB@coj.net>
Sent: Wednesday, September 29, 2021 12:09 PM

Klages, David

From: Brown, Elizabeth
Sent: Thursday, November 18, 2021 3:17 PM
To: Klages, David; Galley, Craig
Cc: Collins, Kathleen; Lathrop, Kenneth; Gupta, Mamta
Subject: RE: Review of Bid Document: Personal Exemptions Audit Service for the Duval County Property Appraiser

David,

I have reviewed and have no concerns.

Thank you,

Elizabeth Brown
IT Operations Manager
Office: 904.255.8199
Cell: 904.652.9186

From: Klages, David <DKlages@coj.net>
Sent: Thursday, November 18, 2021 2:15 PM
To: Galley, Craig <CGalley@coj.net>; Brown, Elizabeth <ElizabethB@coj.net>
Cc: Collins, Kathleen <KathleenC@coj.net>; Lathrop, Kenneth <LATHROP@coj.net>; Gupta, Mamta <MGupta@coj.net>
Subject: RE: Review of Bid Document: Personal Exemptions Audit Service for the Duval County Property Appraiser

Thank you, Craig.

David R. Klages
Purchasing Analyst
City of Jacksonville, Procurement Division
214 N. Hogan Street, Suite 800
Jacksonville, FL 32202
Phone: (904) 255 – 8813
Email: dklages@coj.net

CITY OF JACKSONVILLE

From: Galley, Craig <CGalley@coj.net>
Sent: Thursday, November 18, 2021 2:13 PM
To: Klages, David <DKlages@coj.net>; Brown, Elizabeth <ElizabethB@coj.net>
Cc: Collins, Kathleen <KathleenC@coj.net>; Lathrop, Kenneth <LATHROP@coj.net>; Gupta, Mamta <MGupta@coj.net>
Subject: RE: Review of Bid Document: Personal Exemptions Audit Service for the Duval County Property Appraiser

Hi David,

I reviewed the attached and see no issues as they perform their data analysis externally.

Thanks,

RESPONSE EVALUATION SCORING MATRIX

Title: Personal Exemptions Audit Service for the Duval County Property Appraiser
RFP No.: ESC-0277-22
Close Date: November 10, 2021
Analyst: David Klages
No.: Invited: (6) **Received:** (1) **Other:** (1)
Recorded By: Melissa Pierce

Suppliers/Reviewers	Competence	Financial Responsibility	Professional Accomp-lishments	Current Workload	Fee	Total	Rank
Deckard Technologies, Inc.							
Kathleen Collins	25.00	25.00	15.00	10.00	20.00	95.00	1
Keith Hicks	25.00	25.00	20.00	5.00	20.00	95.00	
Jerry Holland	25.00	25.00	16.00	10.00	20.00	96.00	
Average	**25.00**	**25.00**	**17.00**	**8.33**	**20.00**	**95.33**	

EVALUATION SCORE SHEET

Title: Personal Exemptions Audit Service for the Duval County Property Appraiser
RFP No.: ESC-0277-22
Close Date: November 10, 2021
Analyst: David Klages
No.: Invited: (6) **Received:** (1) **Other:** (1)
Recorded By: Melissa Pierce

Evaluation Criteria	Maximum Points	Deckard Technologies, Inc.
Competence	25	25
Financial Responsibility	25	25
Past and Present Record of Professional Accomplishments with City Agencies and Others	20	15
Current Workload	10	10
Fee (Percentage of Back Taxes Collected) *The Contractor with the lowest percentage will receive the maximum number of points.	20	20.00
	Total Points:	95

Sub-Committee Member Name: Kathleen Collins

Signature: Kathleen Collins

Date: 11/16/2021

EVALUATION SCORE SHEET

Title: Personal Exemptions Audit Service for the Duval County Property Appraiser
RFP No.: ESC-0277-22
Close Date: November 10, 2021
Analyst: David Klages
No.: Invited: (6) **Received:** (1) **Other:** (1)
Recorded By: Melissa Pierce

Evaluation Criteria	Maximum Points	Deckard Technologies, Inc.
Competence	25	25
Financial Responsibility	25	25
Past and Present Record of Professional Accomplishments with City Agencies and Others	20	20
Current Workload	10	5
Fee (Percentage of Back Taxes Collected) *The Contractor with the lowest percentage will receive the maximum number of points.	20	20.00
	Total Points:	95

Sub-Committee Member Name: Keith D. Hicks

Signature: Keith D Hicks

Date: 11/17/21

EVALUATION SCORE SHEET

Title: Personal Exemptions Audit Service for the Duval County Property Appraiser
RFP No.: ESC-0277-22
Close Date: November 10, 2021
Analyst: David Klages
No.: Invited: (6) **Received:** (1) **Other:** (1)
Recorded By: Melissa Pierce

Evaluation Criteria	Maximum Points	Deckard Technologies, Inc.
Competence	25	25
Financial Responsibility	25	25
Past and Present Record of Professional Accomplishments with City Agencies and Others	20	16
Current Workload	10	10
Fee (Percentage of Back Taxes Collected) *The Contractor with the lowest percentage will receive the maximum number of points.	20	20.00
	Total Points:	96

Sub-Committee Member Name: Jerry Holland

Signature:

Date: 11/17/21

Attachment B
Evaluation Matrix

CRITERION	DESCRIPTION	MAXIMUM POINTS
Competence	Describe professional and/or technical education and training; experience in the kind of projects to be undertaken; and availability of adequate personnel. Provide names and resumés of all individuals to be assigned to this project.	25
Financial Responsibility	Describe form of business, i.e., proprietorship, partnership, corporation; years in business; changes in ownership; bank reference(s); past, present, pending and/or threatened legal proceedings within any forum; and any other information the Contractor may wish to supply to demonstrate financial responsibility.	25
Past and Present Record of Professional Accomplishments with City Agencies and Others	Provide a minimum of three (3) completed projects that are similar in nature and scope to the project under consideration with references to include client's contact person and telephone number. Projects must have been held within the last three (3) years. Describe any outstanding accomplishments that relate to specific services being sought.	20
Current Workload	Provide a list of all local, commercial, or government contracts the Contractor currently holds whether the Contractor is the Prime Contractor or a subcontractor. Such list shall include all work for the City of Jacksonville or its various agencies.	10
Fee (Percentage of Back Taxes Collected)	Using Form 1 – Price Sheet, enter your required percentage of the back taxes collected. This shall serve as your fee to the City. The percentage must be inclusive of all fees incurred by your firm. The Contractor with the lowest percentage will receive the maximum number of points.	20

assessments, unclaimed property improvements, and unpermitted construction with a high risk of fraud. This high risk would come from sources such as nationwide information on short-term rentals, out-of-county residents, multiple homes, and multiple homestead exemption claims.

DCPA also requires ability to provide detailed pictorial proof of upgrades on properties, dates & conditions around property sales, deep data on frequently rented short-term properties, deep data on long-term rentals claiming homestead exemption, identify unpermitted remodels, identify unpermitted granny flats, garages, etc.

Please see Section 4 for a full description of the services and deliverables required under this RFP.

1.3 Term of Agreement.

The initial term of agreement will commence upon execution of the Contract and will continue for a one-year period. Buyer will have the option to renew such agreement for up to four (4) additional one-year periods 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 shall provide current proof of all business licenses required by local, state, and federal law as applicable.
2. Must be the publisher or authorized supplier of the software proposed for implementation.
3. Must be the single point of contact and take legal responsibility for the products and services listed in the RFP.
4. The Contractor must have the ability to obtain and maintain liability insurance as required by the City of Jacksonville (Attachment H) and must submit with their response, a signed affidavit from their insurance provider stating they can provide all required coverage at the levels required by the RFP.
5. Contractor must have at least two (2) years of experience in Personal Exemption Fraud detection and investigation and provide a minimum of two (2) contactable, favorable references (Form 4 – Business References). COJ reserves the rights to contact references.

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.

ONE CITY. ONE JACKSONVILLE

City of Jacksonville, Florida

Lenny Curry, Mayor

Procurement Division
Ed Ball Building
214 N. Hogan Street, Suite 800
Jacksonville, Florida 32202

MEMORANDUM

TO: Competitive Sealed Proposal Evaluation Committee ("CSPEC")

FROM: Gregory Pease, Chief of Procurement

DATE: October 1, 2021

RE: Request for Approval to Utilize Competitive Sealed Proposal Process

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Pursuant to Chapter 126, Part 2, § 126.204, approval is requested to utilize the Competitive Sealed Proposal process to formally procure a supplier for **Personal Exemptions Audit Service for the Duval County Property Appraiser.** As a follow-up to the same, the CSPEC is now requested to review and approve the solicitation documents attached hereto.

More specifically, the CSPEC is requested to review and approve the evaluation criteria as outlined in the attached Request for Proposal ("RFP"). Procurement's review in this matter has revealed that:

The attached Certification Letter and the Scope of Services received from the using agency appear to be in order.

The RFP has been reviewed and approved by Risk Management regarding insurance and indemnification requirements.

The RFP has been reviewed and approved by EBO regarding JSEB participation goals and EBO recommends the "Encouragement Plan".

The RFP has been reviewed and approved by ITD regarding technical and security requirements.

It is requested that the CSPEC take these issues into consideration in its review and/or approval in this matter.

CSPEC APPROVAL

Teresa R. Eichner
Finance Director or designee

Procurement Chief or designee

General Counsel or designee

Department/Agency Representative

Public Works Director or designee