

2015

REQUEST FOR PROPOSAL
PRIVATE AUTO TAG AGENCIES
#TC-PUR-040715-PTA



Orange County Tax Collector

3/18/2015

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BACKGROUND

The Orange County Tax Collector, Florida, is soliciting proposals from experienced and well-qualified firms within the State of Florida for consideration to provide services on the following project.

The Tax Collector will **not** be liable for any costs incurred by proposers in replying to the Request for Proposal, or if interviewed, presentation costs.

SCOPE OF SERVICES

The Orange County Tax Collector invites qualified firms to provide professional services specifically addressing Motor Vehicle tags and titles in South Orlando, Florida. The firm(s) must be financially stable to establish and operate in accordance with a contract to be awarded pursuant to this RFP.

The firm(s) should have knowledge of queuing systems and capabilities which at a minimum will provide the ability to configure thresholds and rules to help automate real-time management of queue volumes, allow for an administrative role that can configure the agents of the system and allow them to define the service type each agent can manage. If there are additional functionalities to consider, please include them in your response.

The awarded contractor will maintain the system in working order, providing all software releases and employee training during the term of the contract and subsequent extensions at no additional cost to the Tax Collector.

The Department of Highway Safety and Motor Vehicles (DHSMV) is proposing a new contract to be signed by all Tax Collectors and any private tag agencies. Please contact the Tax Collector if a copy of said contract is needed.

Submittal Instructions

This solicitation is open to the general marketplace.

To ensure that your proposal is responsive, you are urged to request clarification or guidance on any issues involving this solicitation before submission of your response. Firms may also prepare responses and any requested ancillary forms using other means but following the same order as presented herein.

Submit twelve (12) total copies of all requested materials and two (2) CD's containing all requested materials to:

Cindy L. Valentine, CFO
Orange County Tax Collector
SunTrust Center Tower
200 S. Orange Avenue, Suite 1600
Orlando, FL 32801

For additional Project Information Contact:

Director of Motorist Services, Regina McDaniel
Phone: 407-836-2706
Email: rmh@octaxcol.com

TIMETABLE

The Tax Collector has issued a timetable for the RFP, allowing firms to respond timely and sufficient time for the RFP selection committee to efficiently and effectively review the responses and grade them based on merit and costs. Below are guidelines for the submission and review process.

DATE	EVENT
March 30, 2015	Release of RFP
April 13, 2015	Submission of RFP Questions
April 20, 2015	Pre-Bidder Conference @ 10:00 a.m., if necessary
April 27, 2015	Submission of RFP Deadline by 3:00 p.m., Local time
May 04, 2015	Evaluation of Responses
May 08, 2015	General Presentation b finalist(s) if necessary
May 11, 2015	Selection of Service Provider (Award notification)

All times, dates and actions are subject to change. All meetings are publicly posted and open to the public under the "Sunshine Law".

Selection Process

A Selection Committee (SC) will be responsible for recommending the most qualified firm(s) and ranking them for negotiation. The process for this procurement may proceed in the following manner:

The Purchasing Division delivers the submittals to agency staff for summarization for the selection committee members. Agency Staff will prepare an analysis report which includes a matrix of responses submitted by the firms. Staff will also identify any incomplete responses. The Chief Financial officer will review the information provided in the matrix and will make a recommendation to the selection committee as to each firm's responsiveness to the requirements of the RFP. The final determination of responsiveness rests solely on the decision of the selection committee.

Short Listing

The SC will meet to create a short list of the most qualified firms. The matrix and staff analysis report is a tool the SC may use in its decision-making process. The Tax Collector will not consider oral or written communications, prior to the conclusion of short-listing the firms, which may vary the terms of the submittals.

Cone of Silence

Orange County's Cone of Silence Ordinance shall be applied after the occurrence of first scheduled meeting of the selection committee. The Cone of Silence, Section 2-355, Orange County Code of Ordinances means that after the first meeting of the selection committee, potential vendors and their representatives are substantially restricted from communicating regarding the RFP with any member of the Tax Collector's staff. The interested firm(s) may contact the Chief Financial Officer with any issues. The Cone of Silence terminates when the Tax Collector takes action that ends the solicitation.

Demonstrations

If this box is checked, then this project may lend itself to an additional step where short-listed firms demonstrate the nature of their offered solution. In those cases, staff, and sometimes members of the SC, may request a representative display or demonstration. If the SC decides that demonstrations are necessary, short-listed firms will receive a description of, and arrangements for, the desired demonstration. The SC draws the order of demonstration by lots.

Pricing

Price may be considered in the final evaluation and ranking of the short-listed firm(s). If the SC will consider price, staff will provide each short-listed firm with a pricing submittal instrument and instructions for its preparation and delivery.

Presentations/Interviews/Ranking

Each of the short-listed firms may have an opportunity to make an oral presentation to the SC on the firm's approach to this project and the firm(s) ability to perform. The SC may provide a list of subject matter for the discussion. The firm(s) will have equal time to present but the question-and-answer time may vary. The SC will rank the firms and report its recommendations to the appointing authority.

Negotiation and Award

The Tax Collector will attempt to negotiate a contract with the first ranked firm(s). If an impasse occurs, the Tax Collector ceases negotiation with the firm(s) and begins negotiations with the next-ranked firm(s).

Protest Procedures

Failure to file a formal written protest with the Tax Collector no later than 5:00 p.m. on the fifth full business day after posting shall constitute a waiver of bid protest proceedings.

Cancellation of Project

The SC, with the approval of the Purchasing Administrator, may choose to cancel this project and recommend rejecting all proposal responses.

***** NOTICE TO PROPOSERS*****

Proposers are invited to pay strict attention to the following requirements of this RFP. The information being requested in this section is going to be used by the Selection Committee during the selection/evaluation process and further consideration for contract award.

RESPONSIVENESS CRITERIA

Failure to provide the information required by Items 1, 2 and 3, below, at the time of submittal opening may result in a recommendation of non-responsive by the Purchasing Administrator. The Selection Committee will determine whether the firm is responsive to the requirements specified herein. The Tax Collector reserves the right to waive minor technicalities or irregularities as in the best interest of the Tax Collector in accordance with Section 287.057 of the Orange County Procurement Code.

1. Financial Information

All firms are required to permit the Tax Collector to inspect and examine their financial statements. Each firm shall submit its annual financial statements for three (3) years as required by item # 4 of the Company Profile section of this RFP, in the form of its: (1) balance sheet, income statement and annual report; (2) SEC filings. If a firm is privately held and asserts that any of its financial statements are confidential trade secret information, the firm shall make new financial statements which it asserts are confidentially available in Orange County, Florida, for inspection and examination by the appropriate Tax Collector staff prior to evaluation rating or no later than the time specified in writing by the Chair of the selection committee. The financial statements are not required to be audited financial statements.

An element of responsiveness for purposes of disclosing the financial statements required by this RFP is that the firm act in good faith in making its disclosure. Therefore, with respect to the number of years of financial statements required by the RFP, the firm must fully disclose the information for all years; provided, however, if the firm has been in business for less than the required number of years, then the firm must disclose for all years of the required period that the firm has been in business, including any partial year-to-date financial statements. In the event that the firm has not been in existence for the number of years required, the firm shall submit the above requested information for any other business entities engaged in auto tag agencies or related business in which the interested firm shares a common ownership interest of any kind or nature.

2. Litigation & Other Contract Dispute Information

All firms are required to make the following disclosures to the Tax Collector in their submittal to this RFP: Each firm shall list and describe all business-related lawsuits and litigation, claims, arbitrations, and administrative hearings; negligence; errors and omissions; and contract defaults, terminations, suspensions, or failure to perform brought by or against the firms, its predecessor organization(s), any of its wholly-owned subsidiaries, or its principals and officers during the last five (5) years.

The list shall include all case names; case, arbitration, or hearing identification numbers; the name of the project over which the dispute arose; a description of the subject matter of the dispute and the final outcome of the matter or the current status if the matter has not become final.

Project-Specific Criteria

1. Describe all experience on projects of similar nature, scope and duration along with evidence of satisfactory, successful and comparable experience within the past five (5) years.
2. Describe current similar projects and estimated date(s) of completion.
3. List all projects, including project number, within Orange County during the past five (5) years-completed or active.
4. Provide references for all cited projects –completed and active.
5. Provide proposed Hours of Operation, including any evening or weekend hours.
6. Provide proposed location with evidence of approved zoning certificate.
7. Is the firm willing to abide by the proposed Department of Highway Safety and Motor Vehicles contract (DHSMV)?
8. Provide any proposal to measure customer satisfaction, proposed service standards and methods of tracking them.
9. Provide your fee schedule for all services, over and above the fees payable to the State and/or the Tax Collector under the applicable Florida Statutes. Pricing submittal instrument attached for completion.

10. Provide the designation and resume of an individual to act as anticipated Operational Representative.
11. Provide written acknowledgment that he/she is not a licensed motor vehicle dealer, an employee of a licensed motor vehicle dealer, and does not hold a position as an officer or director in a corporation which holds a motor vehicle dealer license.
12. Provide listing of any additional services to be offered.
13. Provide an outline of proposed pay scales for employees, including vacation, sick time and retirement benefits.
14. Provide written acknowledgment agreeing to abide by Florida State Statutes and all requirements relating to the terms and conditions under which Private Auto Tag Agencies must operate.
15. No Tax Collector owned space will be available. Vendors are responsible for securing appropriate space to be approved by the Tax Collector and the Department of Highway Safety and Motor Vehicles.
16. Describe payment methods accepted and any additional fees which may be incurred, (e.g. credit cards, cash, checks) and check return policy.

Company profile

1. Supply legal firm name, headquarters address, local office addresses, state of incorporation, and key firm contact names.
2. Is the interested firm legally authorized, pursuant to the requirements of the Florida Statutes, to do business in the State of Florida?
3. Is the interested firm certified with the Small Business Development Division?
4. Provide information about the firm's financial capabilities by supplying balance sheet, income statement and annual report: (2) SEC filing for the past three (3) years. Include non-disclosure statement for privately held companies.

In the event that the firm has not been in existence for three (3) years, the firm shall submit the above requested information for any other business entities engaged in auto tag agencies or related businesses in which the interested firm shares a common ownership interest of any kind or nature.

5. List and describe all bankruptcy petitions (voluntary or involuntary) which have been filed by or against the interested firm, its parent or subsidiaries, predecessor organization(s), any of its wholly owned subsidiaries, or its principals and officers during the past five (5) years. Include in

the description the disposition of each such petition. In the event that the interested firm has not been in existence for a period of five (5) years, the interested firm shall submit the above requested information for any other business entities engaged in auto tag agencies or related businesses in which the interested firm shares a common ownership interest of any kind or nature.

6. List all claims, arbitrations, administrative hearings, and lawsuits brought by or against the interested firm, its predecessor organization(s), any of its wholly owned subsidiaries, or its principals and officers during the last five (5) years. The list shall include all case names; case, arbitration, or hearing identification numbers; the name of the project over which the dispute arose; a description of the subject matter of the dispute; and the final outcome of the claim. In the event that the interested firm has not been in existence for a period of five (5) years, the interested firm shall submit the above requested information for any other business entities engaged in auto tag agencies or related businesses in which the interested firm shares a common ownership interest of any kind or nature.
7. List and describe all criminal proceedings or hearings concerning business related offenses in which the interested firm, its principals, officers, predecessor organization(s), any of its wholly owned subsidiaries or its principals and officers were defendants.
8. Has the interested firm, its principals, officers, predecessor organization(s), its wholly owned subsidiaries or its principals and officers been debarred or suspended from bidding by any government during the last five (5) years? If yes, provide details. In the event that the interested firm has not been in existence for a period of five (5) years, the interested firm shall submit the above requested information for any other business entities engaged in auto tag agencies or related businesses in which the interested firm shares a common ownership interest of any kind or nature.
9. Has your company ever failed to complete any work awarded to you? If so, where and why?
10. Has your company ever been terminated from a contract? If so, where and why?

Legal Requirements

1. **Cone of Silence:** The Orange County ordinances prohibit certain communication among vendors, Tax Collector staff, and selection committee members. Identify any violation by any members of the responding firm or its joint ventures.
2. **Public Entity Crimes Statement:** A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit an offer to perform work as a consultant or contract with a public entity, and may not transact business with the Tax Collector for a period of thirty six (36) months from the date of being placed on the convicted vendor list. Submit a statement fully describing any violations of this statute by members of the interested firm or its joint ventures.
3. **No Contingency Fees:** By responding to this solicitation, each firm warrants that it has not and will not pay a contingency fee to any company or person, other than a bona fide employee working solely for the firm, to secure an agreement pursuant to this solicitation. For breach of violation of this provision, the Tax Collector shall have the right to reject the firm's response to terminate any agreement awarded without liability at its discretion, or to deduct from the agreement price or otherwise recover the full amount of such fee, commission, percentage, gift, or consideration. Submit an attesting statement warranting that the Responder has not and will not pay a contingency fee to any company or person, other than a bona fide employee working solely for the firm, to secure an agreement pursuant to this solicitation.

4. Drug Free Workplace: Describe any existing drug-free workplace programs as defined in Section 112.0455, Florida Statutes.

5. Location in Orange County: Provide the interested firm's business address, telephone number(s), email address and evidence of relevant County and municipal occupational licenses

6. Domestic Partnership Preference: Describe the Responder's existing domestic partner benefits program.

Please complete the designated area for each numbered item as the maximum service fee amount that you will charge the customer for that service.

Proposed Fee Schedule

Fees to be charge to the customer above the allowable statutory fee

MOTOR VEHICLES – VESSELS – MOBILE HOMES

	<u>Price</u>
1. Issuance, transfer, replacement of license plate and/or Decal and registration certificate	_____
2. Application for original or transfer certificate of title (All kinds, including lien recordings, verifications, all Necessary forms, notarizations, sales tax collection Or exemption)	_____
3. Application for duplicate title	_____
4. Application for assignment of lien (HSMV 82139)	_____
5. Notice of lien (no title transfer involved (HSMV 82139)	_____
6. Duplicate or corrected registration	_____
7. Temporary tags	_____
8. Dealer Handling Fee (maximum per transaction)	_____
9. <u>Dealer Handling Fee located outside of Orange County (Maximum per transaction)</u>	_____
 <u>MISCELLANEOUS</u>	
1. Verification of ownership, lien, tag, decal information, not Included in title information (information Request)	_____
2. Disabled parking permits (up to two permits per applicant)	
Permanent-	_____
Temporary -	_____

3. Certificate of Destruction _____

Proposed Fee Schedule (cont'd)

Fees to be charged to the customer above the allowable statutory fee

MISCELLANEOUS

	<u>Price</u>
4. Certificate of Repossession	_____
5. Fast title Application	_____
6. Fast Title Duplication Application	_____
7. Mail receipt-actual cost of postage for business receipt Mailed to motor vehicle or vessel owner in accordance With Orange County Statutory guidelines, Chapter 287.055	_____
8. Vehicle Identification Number physical verification	_____

Submitted by:

Company Name: _____

Signature and Title: _____

Date: _____