

**DESCRIPTION OF INTENDED
SINGLE SOURCE PURCHASE
(PUR 7776)**

AGENCY: Department of Revenue

TITLE: Time-Trending Factors

Short description of the commodity or service desired: Services to develop time-trending factors to maximize the use of sales of residential properties throughout the state for the assesment role approval process. Perform complex statistical studies to verify that all property appraisers are valuing property equitably, uniformly and in accordance with Florida law.

CONTACT

Name: Zachary Hoskins, OFM Purchasing

Address: 2450 Shumard Oak Blvd. Suite 1600 Bldg 2, Tallahassee, FL 32399

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Internal tracking number, if any: SS 19/20-09

Date posted: 09/13/2019 Last day for receipt of information: 09/24/2019

This description of commodities or contractual services intended for purchase from a single source is posted in accordance with Sections 120.57(3) and 287.057(3), Florida Statutes, and will remain posted for a period of at least 7 business days.

Commodity or Contractual Service Required (commodity or United National Standard Products and Services Code (UNSPSC), manufacturer, model, and description, as appropriate):
80131802 - Real estate appraisal and valuation service.

Quantity or Term (as appropriate):
October 1, 2019 through June 30, 2023

Requestor (division, bureau, office, individual, as appropriate):
DOR Property Tax Oversight, Compliance Determination Process

Performance and/or Design Requirements (e.g. intended use, function or application, compatibility, requirements; reference to policy, rule, statute or other act of the Legislature, etc., as appropriate):
To comply with statutory mandates 195.096, F.S.

Intended Single Source:
Almy, Gloudemans, Jacobs & Denne

A key component to this project is developing time-trending factors by county, stratum (property type), and month that would bring the conditions of these sales (i.e. in time) current to the date of assessment. With this tool in place, the Program will be able to leverage a multi-year database

which would decrease the requirement for resource-intensive appraisal work. Another significant benefit would be that these time-trending factors which lead to adjusted sale prices would provide more accurate statistics for the tax roll approval process even when only employing a year or less of sales.

The Department of Revenue has the responsibility to provide oversight to county property appraisers, tax collectors and value adjustment boards. Time trend factors are used in the review of county assessment rolls. It would be a conflict of interest to accept this assignment while representing clients in the state of Florida before the value adjustment board or completing tax valuation appraisals.

Estimated Dollar Amount:

\$34,000 per FY for total term contract value of \$127.500

Justification for single source acquisition (what is necessary and unique about the product, service or source; steps taken to confirm unavailability of competition, as appropriate):

Since 2009, the Program has contracted with Mr. Gloudemans of Almy, Gloudemans, Jacobs & Denne for the development of time-trending factors. He has a detailed familiarity with the Program and has the working knowledge of the ratio study process. Mr. Gloudemans services are required to continue further calibration which is needed for the residential strata.

During the 2018-19 Fiscal Year we attempted once again to compete this service within the VBS as an ITB. A single response/bid was received and contract was awarded to the responsive bidder. However, after one month it was found that the contractor had no knowledge to adequately perform the complex statistical analysis and from what sources to secure the data used for the strata's required in order to maintain statutory compliance. Therefore, that contract was mutually terminated one month after award. There have been other attempts to achieve full and open competition to no avail. Robert Gloudemans is the SME in this field and the company he is currently a partner with is Almy, Gloudemans, Jacobs and Denne. This is a time limited requirement so time and adherence to deliverable schedules is of paramount importance and does not allow for any delays in formulating these time-trending studies and analysis. Time critical.

Approved By (names & titles, as appropriate, e.g., requestor, requestor management, information systems, budget, purchasing):

Property Tax Oversight, Resource Management Administration Process - Terry Goodwin OMC, Contract Mgr.,

Compliance Determination Process, Lizette Kelly-Revenue Program Administrator, Sue Harlan, Process Manager.

Zachary Hoskins-OFM Purchasing Specialist, John Kinneer-Purchasing Director

Prospective vendors are requested to provide information regarding their ability to supply the commodities or contractual services described. If it is determined in writing by the agency, after reviewing any information received from prospective vendors, that the commodities or contractual services are available only from a single source, the agency shall: provide notice of its intended decision to enter a single-source purchase contract in the manner specified in Section 120.57(3), F.S.