



METROPOLITAN GOVERNMENT OF NASHVILLE AND DAVIDSON COUNTY

February 26, 2020

Lorie Yow
Tax Management Associates, Inc.
2225 Coronation Blvd.
Charlotte-Mecklenburg, NC 28227

Re: **RFQ# -19140, Personal Property Compliance Program**

Dear Ms. Yow:

The Metropolitan Government of Nashville and Davidson County (Metro) has completed the evaluation of submitted solicitation offer(s) to the above RFQ# - 19140, Personal Property Compliance Program. This letter hereby notifies you of Metro's intent to award to **Tax Management Associates, Inc.**, contingent upon successful contract negotiations. Please provide a certificate of Insurance indicating all applicable coverages within 15 business days of the receipt of this letter.

If the Equal Business Opportunity (EBO) Program requirements were a part of this solicitation, the awardee must forward a signed copy of the "Letter of Intent to Perform as Subcontractor/Subconsultant/Supplier/Joint Venture" for any minority/women-owned business enterprises included in the response to the Business Assistance Office within two business days from this notification.

Additionally, the awardee will be required to submit evidence of participation of and contractor's payment to all Small, Minority, and Women Owned Businesses participation in any resultant contract. This evidence shall be submitted monthly and include copies of subcontracts or purchase orders, the Prime Contractor's Application for Payment, or invoices, and cancelled checks or other supporting payment documents. Should you have any questions concerning this requirement, please contact **Cierra Rowe**, BAO Representative, at **615-862-6136** or at **cierra.rowe@nashville.gov**.

Depending on the file sizes, the responses to the procurement solicitation and supporting award documentation can be made available either by email, CD for pickup, or in person for inspection. If you desire to receive or review the documentation or have any questions, please contact Buyer **Scott Ferguson** by email at **mScott.ferguson@nashville.gov** Monday through Friday between 8:30am and 3:30pm.

Thank you for participating in Metro's competitive procurement process.

Sincerely,

A handwritten signature in blue ink that reads "Michelle A. Hernandez Lane".

Michelle A. Hernandez Lane
Purchasing Agent

Cc: Solicitation File, Other Offerors

Pursuant to M.C.L. 4.36.010 Authority to resolve protested solicitations and awards.

A. Right to Protest. Any actual or prospective bidder, offeror or contractor who is aggrieved in connection with the solicitation or award of a contract may protest to the Purchasing Agent. The protest shall be submitted in writing within ten (10) days after such aggrieved person knows or should have known of the facts giving rise thereto.

Procurement Division

730 Second Avenue South, Suite 112
P.O. Box 196300
Nashville, Tennessee 37219-6300

www.Nashville.gov
Phone: 615-862-6180
Fax: 615-862-6179

RFQ# 19140 - Personal Property Compliance Program

Evaluation Criteria (Max Points)	Pellmore & Dobbs PC	Tax Management Associates, Inc
Contract Acceptance	Yes	Yes
Solicitation Acceptance	Yes	Yes
Background Checks	Yes	Yes
Ownership of Information and Data	Yes	Yes
BAO Requirements Satisfied	Yes	Yes
ISA Questionnaire Completed and Terms Accepted	Yes	Yes
Business Plan (30 Points)	15	25
Experience and Qualifications (35 Points)	15	30
Cost Criteria (35 Points)	35	22.18
Total (100 Points)	65.00	77.18

Strengths & Weaknesses

Pellmore & Dobbs PC

Strengths: Firm's intended personnel are educated, trained and experienced in performing work detailed in the Scope of Services.

Weaknesses: Firm did not sufficiently describe in detail their understanding of Metro's needs for the proposed project approach as described in "Services and Specifications" and "Vendor Responsibilities". Firm did not sufficiently describe how they possess the ability, capacity, skill and financial resources to provide the services timely. Firm did not sufficiently describe using customer examples, why they have the character, integrity, reputation, judgement and experience required to provide the services. Firm did not describe in detail where they would store Metro's data files, how they would back them up and how they would deliver them in the event our relationship was terminated. Firm has not performed contracts of a similar size and scope with a public entity such as Metro. Firm's customer references were not for similar companies of size and scope as Metro.

Tax Management Associates, Inc

Strengths: Firm described in detail an understanding of Metro's needs; and proposed a sound approach to the project as described in the section named "Service and Specifications". Firm has performed contracts of a similar size and scope with a public entity such as Metro. Firm's customer references were for similar clients of size and scope as Metro. Firm demonstrated knowledge and understanding of applicable laws, rules and guidelines as it relates to these scope of services.

Weaknesses: Firm did not provide sufficient explanation that the personnel assigned to this project are trained to work on projects such as this.

Solicitation Title & Number			RFP Cost Points	RFP SBE/SDV Points	Total Cost Points
Personal Property Compliance Program.; RFQ# 19140			28	7	35
Offeror's Name	Total Bid Amount	SBE/SDV Participation Amount	RFP Cost Points	RFP SBE/SDV Points	Total Cost Points
Tax Management Associates, Inc.	\$3,442,974.57	\$120,504.00	20.51	1.67	22.18
Pellmore & Dobbs PC	\$2,522,079.51	\$504,415.90	28.00	7.00	35.00

Ferguson, Scott (Finance)

From: Rowe, Cierra (Finance)
Sent: Tuesday, February 18, 2020 9:10 AM
To: Ferguson, Scott (Finance)
Cc: Frye, Jeremy (Finance); Wood, Christopher (Finance - Procurement)
Subject: RE: BAO Review - RFQ# 19140- Personal Property Compliance Program
Attachments: 19140 Personal Property.pdf; 19140 Personal Property.pdf

Good Morning Scott,

Tax Management Associates is compliant with the requirements of the solicitation. The SBE amount is \$120,504.11, 3.5% of the project. Please accept this as my final EBO and SBE assessment for the referenced RFQ.

Thank you,

Cierra Rowe
Contract Compliance Officer
[Office of Minority and Women Business Assistance \(BAO\)](#)
Department of Finance
Metropolitan Nashville Davidson County Government
730 2nd Avenue South, 1st Floor; PO Box 196300 Nashville, TN 37219
(p) 615-862-6136 (f) 615-862-6175

From: Ferguson, Scott (Finance) <Scott.Ferguson@nashville.gov>
Sent: Wednesday, February 12, 2020 3:13 PM
To: Rowe, Cierra (Finance) <Cierra.Rowe@nashville.gov>
Subject: RE: BAO Review - RFQ# 19140- Personal Property Compliance Program

Yes

From: Rowe, Cierra (Finance) <Cierra.Rowe@nashville.gov>
Sent: Wednesday, February 12, 2020 3:12 PM
To: Ferguson, Scott (Finance) <Scott.Ferguson@nashville.gov>
Subject: RE: BAO Review - RFQ# 19140- Personal Property Compliance Program

Scott,

Just confirming, the evaluation committee decided to award Tax Management Associates, Inc., correct?

Cierra Rowe
Contract Compliance Officer
[Office of Minority and Women Business Assistance \(BAO\)](#)
Department of Finance
Metropolitan Nashville Davidson County Government
730 2nd Avenue South, 1st Floor; PO Box 196300 Nashville, TN 37219
(p) 615-862-6136 (f) 615-862-6175

BAO Small Business Assessment Sheet

BAO Specialist: Cierra Rowe
Contract Specialist: Scott Ferguson
Date: 2/18/2020

Department Name: Assessor of Property
RFP/ITB Number: 19140

Project Name: Personal Real Estate Property Compliance Program

Primary Contractor*	Prime Bid Amount	Total Proposed SBE (\$)	SBE Subs approved?	SBE (%)	Comments
Tax Management Associates, Inc.	\$3,442,974.57	\$120,504	Yes	3.5%	The prime is not an approved SBE and proposes to utilize approved SBE Thomason Financial Resources, Inc. \$120,504/ 3.5%.



Statement of M/WBE Utilization

Proposer's/Firm's Name: Tax Management Associates, Inc.	Proposer's Phone #: 704.847.1234
Solicitation Title: Personal Real Estate Property Compliance Program	Proposer's Email Address: chip.cooke@tma1.com
Solicitation #: 19140	Amount Self-performed : 81%
Proposer's/Firm's Ownership: Non-MWBE	Total Bid Amount:\$3,442,974.57
Proposed EBO Goal (%): <u>9%</u> MBE% <u>10%</u> WBE%	EBO Goal Met? (Y/N) Yes

The following MWBE* subcontractor(s)/supplier(s) will be utilized for the performance of this project:

MBE/WBE Firm Name	MBE/WBE Firm Address	Phone/E-Mail	Certificate Type (MBE or WBE)	* MBE/WBE Group Type *	Code # UNSPS/NAICS	Description of Work	MBE/WBE Dollars (\$)	Percent of Total Contract
1 Alan C. Young & Associates, P.C.	7310 Woodward Ave., Ste 740 Detroit, MI 48202	313.873.7500	MBE	1	84110000	Audit	\$309,867.71	9%
2 Homeland, LLC	2550 Meridian Blvd., Ste 180 Franklin, TN 37067	615.567.6151	WBE	5	84110000	Audit Staffing	\$223,793.34	6.5%
3 Thomason Financial Resources, Inc.	1009 Harding Trace Court, Nashville, TN 37221-3968	615.673.7307	WBE	5	84110000	Audit	\$120,504.11	3.5%
4								
5								
6								
7								

I am the duly authorized representative and certify the facts and representations contained in this form and supporting documents are true and correct.

Authorized Representative (Printed Name/Title/Signature)	Date
Richard Cooke, Jr. CEO <i>Richard Cooke, Jr. CEO</i>	1/29/2020

*Note: MWBE is defined as business enterprise maintaining a significant business presence in the Program Area & performing a commercial useful function that is owned by one or more of the following: (1) African Americans (2) Native Americans, (3) Hispanic Americans, (4) Asian Americans, and (5) Women.

For Internal Office Use ONLY

Has Prime Complied with EBO Goal? YES

If No, Good Faith Efforts Met? N/A

BAO Representative: Cierra Rowe

Date: 2/14/2020

Total MBE Subcontracting Total	9	%	\$ 309,867.71
WBE Subcontracting	10	%	\$ 344,297.45
Total MBE/WBE Participation:	19	%	\$ 654,165.16