

# Request for Legislative Action

Res. #21283  
Sponsor: Megan L. Marshall  
Date: May 22, 2023

Completed by County Counselor's Office			
Action Requested:	Resolution	Res.Ord No.:	21283
Sponsor(s):	Megan L. Marshall	Legislature Meeting Date:	5/22/2023

Introduction
<b>Action Items:</b> ['Award']
<b>Project/Title:</b>
Awarding a Twelve-Month Term & Supply Contact with Two Twelve-Month Options to Extend for the furnishing of Services to Post Notice of Foreclosure on properties in Delinquent Land Tax Sale for use by the Collection department from Archon Information Systems, LLC of New Orleans, LA dba CivicSource under the Terms and Conditions of Request for Proposal No. 23-024 as the best bid.

Request Summary
<p>The Collection department requires service to Post Notice of Foreclosure signs on properties in the Delinquent Land Tax Sale. The Purchasing department issued Request for Proposal No. 23-024 in response to those requirements. A total of 74 invitations were distributed, 15 vendors downloaded the bid documents, 2 proposals were received and evaluated.</p> <p>CivicSource was determined to be the best bidder to meet the needs of the department. The Respondent's Proposal with Quotation, W-9 form, Certificate of Compliance, and Department's Recommendation Memo are attached.</p> <p>Pursuant to Section 1054.6 of Jackson County Code, the Purchasing Department and the Collection Department recommend the award of a Twelve (12) Month Term &amp; Supply Contract with Two (2) Twelve (12) Month Options to Extend for Posting Notice of Foreclosure services to CivicSource as the best bid under the terms and conditions of Request for Proposal No. 23-024.</p> <p>The Collection Department estimates Annual Usage at \$42,000 for 2023. This award is made on a "As Needed" basis and does not obligate Jackson County to pay any specific amount. The availability of funds for specific purchase(s) is subject to annual appropriations.</p>

Contact Information			
<b>Department:</b>	Collections	<b>Submitted Date:</b>	5/4/2023
<b>Name:</b>	Karey A. Schulze	<b>Email:</b>	KSchulze@jacksongov.org
<b>Title:</b>	Office Admin	<b>Phone:</b>	816-881-3038

Budget Information	
Amount authorized by this legislation this fiscal year:	<b>!Unexpected End of Formula</b>
Amount previously authorized this fiscal year:	\$ 0
Total amount authorized after this legislative action:	\$

## Request for Legislative Action

Is it transferring fund?			No
<b>Single Source Funding:</b>			
Fund:	Department:	Line Item Account:	Amount:
			<b>!Unexpected End of Formula</b>

<b>Prior Legislation</b>	
<b>Prior Ordinances</b>	
Ordinance:	Ordinance date:
5523	June 21, 2021
<b>Prior Resolution</b>	
Resolution:	Resolution date:
20971	June 6, 2022

<b>Purchasing</b>	
Does this RLA include the purchase or lease of supplies, materials, equipment or services?	Yes
Chapter 10 Justification:	Formal Bid
Core 4 Tax Clearance Completed:	Not Applicable
Certificate of Foreign Corporation Received:	Yes
Have all required attachments been included in this RLA?	Yes

<b>Compliance</b>	
<b>Certificate of Compliance</b>	
In Compliance	
<b>Minority, Women and Veteran Owned Business Program</b>	
Goals Not Applicable for following reason: Less than \$50000	
MBE:	.00%
WBE:	.00%
VBE:	.00%
<b>Prevailing Wage</b>	
Not Applicable	

<b>Fiscal Information</b>	
<ul style="list-style-type: none"> <li>This award is made on a need basis and does not obligate Jackson County to pay any specific amount. The availability of funds for specific purchases will, of necessity, be determined as each using agency places its order.</li> </ul>	

## Request for Legislative Action

### History

Submitted by Collections requestor: Karey A. Schulze on 5/4/2023. Comments:

Approved by Department Approver Michael S. Erickson on 5/5/2023 9:48:31 AM. Comments: Approving for Whitney Miller.

Approved by Purchasing Office Approver Barbara J. Casamento on 5/5/2023 10:12:22 AM. Comments:

Approved by Compliance Office Approver Jaime Guillen on 5/5/2023 1:10:30 PM. Comments:

Returned for more information by Budget Office Approver Mark Lang on 5/5/2023 2:01:45 PM. Comments: Since this is the award of a term and supply contract, please remove all the budget figures on the "Budget Info" tab.

Submitted by Requestor Michael S. Erickson on 5/5/2023 8:44:14 PM. Comments: Removed budget figures as requested. Approving on behalf of Whitney Miller.

Approved by Department Approver Michael S. Erickson on 5/5/2023 8:56:06 PM. Comments: Approved.

Approved by Purchasing Office Approver Barbara J. Casamento on 5/9/2023 9:53:28 AM. Comments:

Approved by Compliance Office Approver Jaime Guillen on 5/9/2023 1:19:18 PM. Comments:

Approved by Budget Office Approver David B. Moyer on 5/9/2023 1:51:35 PM. Comments:

Approved by Executive Office Approver Sylvia Stevenson on 5/10/2023 4:25:01 PM. Comments:

Approved by Counselor's Office Approver Jamesia Manning on 5/18/2023 11:34:52 AM. Comments:



## **JACKSON COUNTY**

### **Collection Department – Kansas City**

415 East 12<sup>th</sup> Street, Suite 100  
Kansas City, Missouri 64106  
www.jacksongov.org

(816) 881-3232  
Fax: (816) 881-3142

#### **M E M O R A N D U M**

To: Craig Reich, Senior Buyer, Purchasing  
Barbara Casamento, Purchasing Administrator, Purchasing

From: Karey Schulze, Office Administrator, Collections

Date: May 1, 2023

Subject: Recommendation for Posting Notice of Foreclosure – RFP 23-024  
Term and Supply Contract

We have reviewed the information provided on the above referenced bid. Collection recommends CivicSource for Posting Notice of Foreclosure services.

In evaluating the submitted information, we find that CivicSource, can meet all of our stated requirements. This company scored 81 out of 100 possible on our evaluation.

We therefore recommend CivicSource. The Collection Department estimates the usage to be \$42,000 for this contract. It will be funded from 001-1405-56786-999-9999-9999-23.

Thank you for your time and attention.

Karey Schulze  
Office Administrator  
Collection Department

*Frank White Jr., County Executive*



## RFP RESPONSE

SUBMITTED TO:

JACKSON COUNTY, MISSOURI  
COLLECTOR

RELATIVE TO:

POSTING NOTICE OF  
FORECLOSURES FOR  
COLLECTIONS CONTRACTOR

(TRUSTEE)

**RFP # 23-024**

APRIL 24, 2023



## A.Proposal Transmittal Letter



A. Proposal Transmittal Letter

**VIA BONFIRE SUBMISSION**

Whitney Miller, Director

**RFP # 23-024: Posting Notice of Foreclosures for Collections** services from CivicSource®

Jackson County Collector

415 E. 12th Street

Suite 100

Kansas City, MO 64106

**RE: Response to Request for Proposal RFP # 23-024**

Dear Ms. Miller:

Archon Information Systems, L.L.C. d/b/a CivicSource® (hereinafter, "CivicSource®") respectfully submits this Proposal in response to **RFP # 23-024** relative to Posting Notice of Foreclosures for Collections for Jackson County, Missouri. This Proposal remains valid for one hundred and twenty (120) days from the date of proposal opening and thereafter in accordance with any resulting contract between CivicSource® and Jackson County.

Having served as the Posting Notice of Foreclosures for Collections provider for Jackson County in 2022, if awarded the contract, CivicSource® meets all mandatory requirements outlined in **RFP # 23-024**. CivicSource® shall comply with all provisions of **RFP # 23-024** and agrees with each item included in the Request for Proposal No. 23-024.

Contact: Allison Kelley, Senior Account Manager  
Address: CivicSource®, PO Box 50001, New Orleans, LA 70150  
Telephone: (985) 966-1390  
Email: [Allison.Kelley@CivicSource.com](mailto:Allison.Kelley@CivicSource.com)

Respectfully submitted,

Allison Kelley  
Senior Account Manager



## B. Executive Summary



## B. Executive Summary

Archon Information Systems, L.L.C., d/b/a CivicSource® is a New Orleans based company with over 40 employees specializing in the design, development and application of technology-driven solutions that ensure legal compliance in the delinquent property tax sale process. Since 2008, CivicSource® has been a leading provider of digitized applications to ensure legal due process compliance and conduct online auctions that assist taxing authorities with the critical duty of collecting delinquent ad valorem taxes.

CivicSource® is a technology company with a deep dedication to customer service. From our development team that consistently delivers innovative features for investors, to our committed customer support team helping bidders and taxpayers navigate online tax sales, the CivicSource® corporate culture is steeped in service. We recognize that our clients are elected officials and that the actions of their vendors are a direct reflection on the governments we serve.

CivicSource.com is a consolidated online auction platform allowing investors to research, purchase and manage their tax sale investments from a single interface while allowing taxing authorities to customize their auction parameters.

CivicSource® assigns a dedicated Account Manager to each of its taxing authority clients. The Account Manager coordinates necessary data integration, client customizations, collection, pre-auction and auction configuration and scheduling. CivicSource® works closely with the IT personnel within the taxing authority to establish a data integration link, enabling efficient transfers of delinquent parcel data. This integration also permits automatic removal of properties from the CivicSource® database when the delinquent taxes are paid to the taxing authority. CivicSource® conducts a nightly import of payment activity from the taxing authority to ensure regular data updates. Additionally, where available, CivicSource® imports GIS parcel layers and shapefiles for all or a specified list of the taxing authority's properties, and applies the data to functional maps for investors to view.

The Account Manager also works diligently with each taxing authority to determine all of the parameters of the auction. Date, time, length and even specific notes on a per-property basis are available for customization. Once the sale is configured and approved by the taxing authority, approved parcel data for the delinquent properties can be made public on CivicSource.com.

CivicSource® presently has over 70,000 registered users who participate in its online government tax lien and tax deed auctions. Because investors are able to participate in auctions from multiple taxing authorities on one site, our clients often experience a broader base of investors participating in their auctions, with greater competition and higher rates of properties sold.



In addition to online tax sales, CivicSource<sup>®</sup> can provide a taxing authority all required efforts to ensure the entire tax sale process is both effective and legally compliant. Services include abstracting, title examinations, interested party title research, skip tracing and publication-service of process, sign posting, custom notices, comprehensive mail and return mail management. CivicSource<sup>®</sup>'s proprietary technology and staff of experienced tax sale professionals bring automation and accuracy to the tax sale process, offering a product that exceeds all Federal, State and local legal requirements. CivicSource<sup>®</sup> Administrator creates an individualized history for each property of all legal efforts performed, and taxing authorities have on-demand access to all due process compliance efforts for public records requests or challenges.



## C.Proposer Team Experience and References



- C. The CivicSource<sup>®</sup> Management Team represents decades of experience in the fields of legal, collection and technology services. Delivery of the RFP-requested services starts with our Team members profiled below.

**Bryan Barrios, Chief Executive Officer**

*Bryan Barrios is an entrepreneur who, for over a decade, has focused solely on tax collections. Beginning in 2001, Barrios formed the Tax Collection Division of the Scheuermann & Jones Law Offices, where he served as its director until 2005. Thereafter, he formed Strategic Alliance Partners, L.L.C. and served as its Executive Director until 2007. In 2008, he co-founded Archon Information Systems, L.L.C., where he continues to serve as its Chief Executive Officer. Barrios' expertise is property tax collections, and, over the past ten years, he has contributed content on over a dozen pieces of state and local legislation that helped shape property tax law in Louisiana. Barrios has a B.A. in business administration and history from Nicholls State University and attended Juris Doctorate studies at Loyola University School of Law. He completed Peace Officer Standards and Training Certification from the Lafourche Parish Sheriff's Training Academy and is a deputized law enforcement officer. Barrios is a member of National and Louisiana Sheriff's Associations, National Tax Lien Association, and an Ad Valorem Tax Committee Member of the Louisiana Association of Tax Administrators. He has been a featured speaker many times on Louisiana tax and adjudicated property sales.*

**Daniel E. Rebeor, Chief Operating Officer**

*Daniel Rebeor has over 25 years' experience in commercial real estate and operational leadership. Mr. Rebeor is responsible for day-to-day operations of the company, including operations, business development, legal and administration. Before joining CivicSource<sup>®</sup>, Mr. Rebeor was Chief Operating Officer & General Counsel at BLVCKDOT, a real estate management company serving the wireless industry. Prior to that, Mr. Rebeor was with CBRE, serving as the retail operations lead for a major U.S. wireless carrier. Prior to CBRE, Mr. Rebeor was a Senior Vice President with Tavistock Development Company. Previous Mr. Rebeor served as Executive Vice President and General Counsel of Landmark Dividend LLC. Mr. Rebeor graduated in 1989 from the State University of New York at Fredonia, where he received a B.S. degree in Communications/Media and in 1994 from the University of Dayton School of Law, where he received his Juris Doctor. He is licensed to practice law in Ohio and is an Authorized House Counsel in Florida.*



**Clark McClendon, Senior Data Acquisition Manager**

*Clark McClendon has over 28 years of experience in the information technology field. McClendon operated a successful computer consulting practice for 17 years catering to a diverse customer base. As a systems analyst, McClendon provided technical and customer support for a suite of software products designed to meet specific aspects of property assessment and tax collection. As Senior Data Acquisition Manager, McClendon is responsible for developing policies and procedures for the collection of data from external sources, such as Sheriffs and other political subdivisions for the purpose of tax collection and adjudicated property sales. He manages a team that verifies the data and the collection process meets company standards. He holds a B.A. in Computer Science from Nicholls State University.*

**Garrett Staples, Director of Operations and Account Manager**

*Garrett Staples has over 7 years of account management experience at CivicSource<sup>®</sup>. He specializes in tax delinquent property sale solutions for clients in Louisiana, Kansas, Missouri, Rhode Island and Tennessee. Garrett has developed tools and enhanced processes to manage a wide variety of client needs. He holds a B.S. in Business Administration from Bryant University and served 5 years in the United States Army as a member of the military's bomb disposal units (EOD). Garrett works hand in hand with CivicSource<sup>®</sup>'s Legal, Software Development and Operations Departments to seamlessly coordinate services for clients.*

**Allison Kelley, Senior Account Manager**

*Allison Kelley has over 7 years of account management experience at CivicSource<sup>®</sup>. She specializes in tax delinquent property sale solutions for clients in Louisiana and Missouri. Allison has developed tools and enhanced processes to manage a wide variety of client needs. She holds a B.S. from Louisiana State University. Allison works hand in hand with CivicSource<sup>®</sup>'s Legal, Software Development and Operations Departments to seamlessly coordinate services for clients.*



Organization	Contact	Address	Phone	Dates of Service	Size & Scope
Caddo Parish Sheriff	Steve Prator	501 Texas St. Room 101 Shreveport, LA 71101	(318) 681-0611	2009-Present	18,878 Properties \$10,671,000 in Delinquencies
City of New Orleans	Norman White	1300 Perdido St. Room 3E06 New Orleans, LA 70112	(504) 658-1500	2008-Present	14,758 Properties \$31,000,000 in Delinquencies
Unified Government of Wyandotte County and Kansas City, Kansas	Wendy Green	710 N. 7 <sup>th</sup> Street Suite 220 Kansas City, KS 66101	(913)573-5679	2020-Present	824 Properties \$7,290,467 in Delinquencies

*“The City of New Orleans alone could not perform the necessary pre-sale and post-sale services that CivicSource® provides with its proprietary software, personnel, and tax sale expertise. To perform these tax sale services pursuant to Mennonite on its own, the City would have to incur significant increases in time, personnel, and technological improvements. ”*



**Norman S. Foster, Director of Finance**

City of New Orleans

P: 504.658.1500

E: [nsfoster@nola.gov](mailto:nsfoster@nola.gov)

**Dates of Service:** 2008-Present

**Relevancy to Project Scope:** Charged with property tax collection and conducting the online sale of delinquent tax deeds including skip trace and title services associated with pre-auction services.

*“We could not afford to put a system together like CivicSource®. With all of the backup they have and all of the support that they have, we couldn’t have afforded to do that. But we can afford to take part in the expertise that they have learned. I would recommend that any tax collector at least look at this. I can’t say what’s best for any other Sheriff, but this has been best for us.”*



Steve W. Prator, Sheriff & Ex Officio Tax Collector

Caddo Parish Sheriff's Department

P: 318.681.0611

E: [sprator@caddosheriff.org](mailto:sprator@caddosheriff.org)

**Dates of Service:** 2009-Present

**Relevancy to Project Scope:** Charged with property tax collection and conducting the online sale of delinquent tax deeds including skip trace and title services associated with pre-auction services.

In addition to the services described in this Proposal, CivicSource® offers the taxing authority the opportunity to outsource the entire tax sale process to the Company, from pre-sale notification and collection efforts to post-sale creation and filing of statutorily-required documents. CivicSource® is a web-based due process compliance platform custom built to ensure research for all properties in the tax sale process exceeds Federal, State and local legal requirements. The platform was built in order to help taxing authorities withstand any legal challenge to the validity of a tax sale due to the lack of notice. All efforts to locate, contact and notify delinquent homeowners and interested parties are digitally archived and appended to each account for on-demand retrieval.

CivicSource® is capable of handling all aspects of the pre-sale, online tax sale and post-sale process, including but not limited to:

- Importing and creating a specific account for each delinquent property.
- Stepping each property through the entire tax sale process on behalf of the taxing authority.
- Scrubbing the name and address of each owner to insure data quality.
- Skip tracing each owner to find current mailing address and phone numbers.
- Calling each account to confirm the address and explain payment options. Audio recordings of each call are appended to the corresponding account.
- Handling inbound support questions about the tax sale process and directing tax payers to the appropriate payment locations.
- Conducting Public Records title research to locate all interested parties on each account.
- Creating and Mailing Certified and First-Class Notice of Tax Sales to each owner and interested



party. Each notice and certified green card returns are appended to the corresponding account.

- Monitoring each account for bankruptcies and change orders.
- Creating and placing all statutorily required official journal publications in the paper of record.
- Funding presale marketing campaigns to promote participation in the online tax sale.
- Conducting tax sales at CivicSource®.com, taking payments and remitting funds to taxing authority.
- Creating all sale certificates and legal documentation to be filed with the clerk of court.
- Sending statutorily required post sale notifications.
- Providing customizable on-demand reporting of the entire tax sale process.

The taxing authority has permanent access to all due process efforts through CivicSource® Administrator. CivicSource® will create any additional legal notifications, documents, or certificates to ensure compliance.





## D. Financial Proposal



## D. Financial Proposal

- a. For the Posting Notice of Foreclosures for Collections: Itemized costs, fees and any commissions for the services in the scope of work for this proposal.

**Posting Notice of Foreclosures for Collections will be provided for \$35 per property posted.**

- b. Additional charges or fees in this proposal.

**There are no additional charges or fees associated with the price proposal.**

- c. Overall cost for the entire project.

**Overall cost shall be \$35 per property posted, multiplied by the number of properties posted.**