

LEGISTAR # 200509
Attachment E



CIVIL LEGAL AID SINCE 1978

PROPOSAL

FAMILY WEALTH BUILDING PROJECT
1000 NE 16TH AVENUE, BUILDING I, GAINESVILLE, FLORIDA 32601

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TECHNICAL PROPOSAL

BRIEF PROJECT DESCRIPTION:

Three Rivers Legal Services, Inc. (TRLS) is seeking funding to provide civil legal services to heirs property “owners” residing in specific neighborhoods of Gainesville, Florida. The “Family Wealth Building Project” (hereinafter referred to as the “Project”) is an heirs property project that will stabilize communities of color by giving homeowners title to heirs property, thereby enabling the homeowners to negotiate with lenders for lower mortgage payments, obtain homeowners insurance, obtain property tax homestead exemption, and obtain repairs and/or rehabilitation of homes that are at risk of demolition.

ORGANIZATIONAL BACKGROUND:

Three Rivers Legal Services, Inc. is a private, not-for-profit corporation serving North Florida since 1978. TRLS provides free civil legal assistance to low-income families in seventeen counties with three offices and a staff of more than 50, including 24 attorneys. The organization provides legal information and education to low income persons and groups, in addition to providing direct legal services to individual clients. The main office of TRLS, which is located in Gainesville, has been providing direct legal services to the residents of Alachua County for more than 40 years. The staff of TRLS has extensive experience representing heirs in a variety of legal issues, including probate and quiet title actions.

In January, 2019, TRLS implemented the “Home Sweet Home” project, which has served clients in all seventeen counties of TRLS’ service area. Since its inception, the project has netted a financial benefit to clients and families in an amount exceeding 2.5 million dollars. At the end of the first year of the project, the total value of the homes

secured or stabilized was approximately \$1.4 million. In year two, another \$1.2 million worth of property was secured for clients, despite the tremendous hurdles of providing legal services during a pandemic. These values are based on taxable values rather than market values thus the true value of the homes secured likely exceeds three million dollars.

The Home Sweet Home project was made possible with funding from the Florida Bar Foundation. Unfortunately, that funding ended as of December 31, 2020. TRLS anticipates it will be awarded a much smaller grant from the Florida Bar Foundation beginning July 1, 2021, however, that funding will be needed to finish cases for existing clients, to serve clients who have been on a waiting list for services and to serve a limited amount of new clients throughout the seventeen counties of TRLS' service area. If funded, the Family Wealth Building Project will allow TRLS to provide these very valuable services to the residents of Gainesville, which in turn will stabilize the neighborhoods and enable these clients to build their families' wealth.

PROJECT OVERVIEW:

Heirs property issues hinder community economic development in numerous ways. Homes become dilapidated because the "owners" are unable to enter into contracts for repairs and they are prevented from obtaining financial assistance for needed repairs; homes that are damaged due to natural disasters cannot be repaired with FEMA funding when ownership is unclear; some properties are "abandoned" by the heirs because the heirs don't know they possess an ownership interest; some properties are lost due to unpaid taxes; and others are foreclosed upon because the heirs are unable to obtain loan modifications or property insurance until they possess clear title to the properties. Studies

show that heirs property issues disproportionately affect African-American households, particularly in low-income communities. [The Florida Bar Journal, Volume 92, No. 8, citing Nat'l Conference of Commissioners on Uniform State Laws, Uniform Partition of Heirs Property Act 1-4 (2010) and B. James Deaton, A Review and Assessment of the Heirs Property Issue in the United States, 461 J. Econ Issues 615, 616-619 (2012)]. TRLS has developed an outreach and direct delivery service project to address heirs property issues in an effort to protect minority homeowners from losing their property, and to improve living conditions of neighborhoods with large percentages of heirs property.

Two attorneys (a staff attorney and a supervising attorney) will provide legal representation in probate, quiet title and adverse possession matters. The staff attorney will work on the Project full-time while the supervising attorney will spend a portion of her time working on the Project with the staff attorney. The City of Gainesville (hereinafter referred to as the "City") has identified the target population for services pursuant to the Project. The City will refer clients directly to TRLS for services. As TRLS has already been providing legal services in probate matters for many years, TRLS is ready to begin serving clients immediately upon receipt of the referrals.

MINIMUM QUALIFICATIONS AND PRICE PROPOSAL DETAILS:

TRLS will provide legal services to referred clients at the rate of \$100 per attorney case hour. The supervising attorney, who specializes in probate law, has been with TRLS since 2019. Prior to joining the staff of TRLS, she was in private practice since 2009, providing legal representation to clients in probate and family law matters. The staff attorney who will be assigned to the Project is an experienced attorney who has provided

legal services regarding a wide variety of substantive areas of law. The supervising attorney will oversee the project on a daily basis and will co-counsel with the staff attorney on more complex cases. All TRLS staff attorneys and supervising attorneys are licensed to practice law in the state of Florida and are in good standing with The Florida Bar.

GOALS AND OBJECTIVES:

Clients who currently “own” heirs property will receive legal assistance in clearing title to the real property, which will produce numerous positive outcomes. (1) Clients will become eligible to receive the homestead tax exemption, thus they will be able to afford to pay property taxes rather than having tax certificates issued and eventually sold at tax deed sales. (2) Clients will become eligible for home repair programs which will prevent loss/deterioration of homes and they will be able to apply for home equity lines of credit to improve their homes. (3) Clients will be eligible to negotiate with lenders for mortgage modifications on properties that are encumbered by mortgages at the time of death of the decedents. (4) Clients who have been victims of a disaster will be eligible for FEMA and other benefits to restore their homes to a safe and sanitary state. (5) Improving living conditions of older homes improves the morale and can improve the health of family members. (6) Homeownership promotes stability and permanency for communities and neighborhoods and increases property values, thus the individual families build wealth while the entire community benefits by improving housing for Project clients.

PART 3 – PRICE PROPOSAL

Proposer Company Name: Three Rivers Legal Services, Inc.

If billing will be hourly fees, provide rate/hour: \$ 100 per hour

If billing will be a flat fee to clear a title, provide that fee here: \$ _____

Two attorneys (a staff attorney and a supervising attorney) will provide legal representation in probate, quiet title and adverse possession matters. The staff attorney will work on the Project full-time while the supervising attorney will spend a portion of her time working on the Project with the staff attorney. TRLS will provide legal services to referred clients at the rate of \$100 per attorney case hour.

Minimum Qualifications: The supervising attorney, who specializes in probate law, has been with TRLS since 2019. Prior to joining the staff of TRLS, she was in private practice since 2009, providing legal representation to clients in probate and family law matters. The staff attorney who will be assigned to the Project is an experienced attorney who has provided legal services regarding a wide variety of substantive areas of law. The supervising attorney will oversee the project on a daily basis and will co-counsel with the staff attorney on more complex cases. All TRLS staff attorneys and supervising attorneys are licensed to practice law in the state of Florida and are in good standing with The Florida Bar.

NOTE: When cost estimating air travel, the City allows for Coach fare only. In addition, long distance phone calls, printing, and other administrative costs may be billed at cost only – no mark-up. Evidence of these expenditures will be submitted when invoicing the City.

Submitted by:

Walter Anthony Wisz
Name (printed)

Walter Anthony Wisz
Signature

04/21/2021
Date

Executive Director
Title

RFP COVER PAGE



Procurement Division
200 E University Avenue, Rm 339
Gainesville, FL 32601
(352) 393-8789
Bid Posted Date: 03/23/21

REQUEST FOR PROPOSAL:		CRAX-210034-GD Probate Legal Services for Heirs Property Program	
PRE-PROPOSAL MEETING:		<input checked="" type="checkbox"/> Non-Mandatory <input type="checkbox"/> Mandatory <input type="checkbox"/> N/A <input type="checkbox"/> Includes Site Visit	
DATE: Wednesday, March 31, 2021		TIME: 2:00pm Eastern Time	
LOCATION: ZOOM – all Zoom access information is located in Exhibit F			
QUESTION SUBMITTAL DUE DATE		Wednesday, April 7, 2021, 3:00pm Eastern Time	
DUE DATE FOR UPLOADING PROPOSAL: Friday, April 23, 2021, 3:00pm Eastern Time			
SUMMARY OF SCOPE OF WORK: The City of Gainesville (hereafter "City") is requesting proposals from qualified providers of probate legal services to assist neighbors gain title of heirs property through a forthcoming Heirs Property Assistance Program. The selected vendor will be an extension of the Gainesville Community Reinvestment Area (GCRA) team. It is the goal of the GCRA to award the top responsible and responsive bidder a contract for one year with the possibility of two one-year extensions. However, the City reserves the right to award to more than one firm if it is deemed necessary for the success of the Heirs Property Assistance Program.			
For questions relating to this solicitation, contact: Gayle Dykeman, dykemangb@cityofgainesville.org			
Bidder is <u>not</u> in arrears to City upon any debt, fee, tax or contract: <input checked="" type="checkbox"/> Bidder is NOT in arrears <input type="checkbox"/> Bidder IS in arrears Bidder is not a defaulter, as surety or otherwise, upon any obligation to City: <input checked="" type="checkbox"/> Bidder is NOT in default <input type="checkbox"/> Bidder IS in default.			
Bidders who receive this bid from sources other than City of Gainesville Procurement Division or DemandStar.com MUST contact the Procurement Division prior to the due date to ensure any addenda are received in order to submit a responsible and responsive offer. Uploading an incomplete document may deem the offer non-responsive, causing rejection.			
ADDENDA ACKNOWLEDGMENT: Prior to submitting my offer, I have verified that all addenda issued to date are considered as part of my offer: Addenda received (list all) # <u>Addendum No. 1</u>			
Legal Name of Bidder <u>Three Rivers Legal Services, Inc.</u>			
DBA: <u>Three Rivers Legal Services, Inc.</u>			
Authorized Representative Name/Title: <u>Walter Anthony Wisz, Executive Director</u>			
E-mail Address: <u>anthony.wisz@trls.org</u>		FEIN: <u>591797499</u>	
Street Address: <u>1000 NE 16th Avenue, Bldg. I, Gainesville, FL 32601</u>			
Mailing Address (if different): _____			
Telephone: (<u>352</u>) <u>372-0519</u>		Fax: (<u>352</u>) <u>375-1631</u>	
By signing this form, I acknowledge I have read and understand, and my business complies with all General Conditions and requirements set forth herein; and,			
<input checked="" type="checkbox"/> Proposal is in full compliance with the Specifications. <input type="checkbox"/> Proposal is in full compliance with the Specifications except as specifically stated and attached hereto.			
SIGNATURE OF AUTHORIZED REPRESENTATIVE: <u>Walter Anthony Wisz</u>			
SIGNER'S PRINTED NAME: <u>Walter Anthony Wisz</u>		DATE: <u>April 21, 2021</u>	

This page must be completed and uploaded to DemandStar.com with your Submittal.

EXHIBIT B

BIDDER VERIFICATION FORM

1. Local Preference (Check one)

Local Preference requested: ☒ YES ☐ NO

A copy of the following documents must be included in your submission if you are requesting Local Preference:

- a) Business Tax Receipt **Note: TRLS is not required to file a local tax return. A copy of the Lease is attached.**
b) Zoning Compliance Permit

2. Qualified Small Business and/or Service Disabled Veteran Business Status (Check one)

Is your business qualified, in accordance with the City of Gainesville's Small Business Procurement Program, as a local Small Business? ☐ YES ☒ NO

Is your business qualified, in accordance with the City of Gainesville's Small Business Procurement Program, as a local Service-Disabled Veteran Business? ☐ YES ☒ NO

3. Living Wage Compliance

See Living Wage Decision Tree: (Check one)

☐ Living Wage Ordinance does not apply (check all that apply)

☒ Not a covered service

☐ Contract does not exceed \$100,000

☐ Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.

☐ Located within the City of Gainesville enterprise zone.

☐ Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

4. Registered to do business in the State of Florida

Is Bidder registered with Florida Department of State's, Division of Corporations, to do business in the State of Florida?

☒ YES ☐ NO (refer to Part 1, 1.6, last paragraph)

If the answer is "YES", provide a copy of SunBiz registration or SunBiz Document Number (# 740896)

If the answer is "NO", please state reason why:

5. Diversity and Inclusion (Applies to solicitations above \$50,000)

Does your company have a policy on diversity and inclusion? ☒ YES ☐ NO

If yes, please attach a copy of the policy to your submittal.

Note: Possessing a diversity and inclusion policy will have no effect on the City's consideration of your submittal, but is simply requested for information gathering purposes.

Three Rivers Legal Services, Inc.

Bidder's Company Name

Walter Anthony Wisz, Executive Director

Printed Name/Title of Authorized Representative

Walter Anthony Wisz

Signature of Authorized Representative

04/21/2021

Date

This page must be completed and uploaded to DemandStar.com with your Submittal.

EXHIBIT A DRUG-FREE WORKPLACE FORM

The undersigned bidder in accordance with Florida Statute 287.087 hereby certifies that

Three Rivers Legal Services, Inc. does:
(Name of Bidder)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for the drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this bidder complies fully with the above requirements.

Walter Anthony Wisz

Bidder's Signature

April 21, 2021

Date

In the event of a tie bid, bidders with a Drug Free Workplace Program will be given preference. To be considered for the preference, this document must be completed and uploaded to DemandStar.com with your Submittal.

EXHIBIT C REFERENCES FORM

Company Name of Bidder: Three Rivers Legal Services, Inc.

Provide current contact information for three references of similar scope performed within the past three years.

- 1 Dates services were provided 2019 - 2021
Company Name Shimberg Center for Housing Studies
Address Post Office Box 115703
City/State/Zip Gainesville, FL 32611-5703
Contact Name Anne Ray
Phone Number (352) 273-1195
Email Address aray@ufl.edu

- 2 Dates services were provided 2019-2021
Company Name University of Florida Levin College of Law
Address Post Office Box 117629
City/State/Zip Gainesville, FL 32611
Contact Name Professor Joan Flocks
Phone Number (352) 273-0839
Email Address Flocks@law.ufl.edu

- 3 Dates services were provided 2019-2021
Company Name Judge Denise Ferrero, Circuit Judge, Eighth Judicial Circuit
Address 201 East University Avenue, Room 302
City/State/Zip Gainesville, FL 32601
Contact Name Judge Denise Ferrero
Phone Number (352) 548-3700
Email Address FeagleR@circuit8.org (judicial assistant - Raina Feagle)

This page must be completed and uploaded to DemandStar.com with your Submittal.

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Give Form to the
requester. Do not
send to the IRS.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Three Rivers Legal Services, Inc.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ►

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☒ Other (see instructions) ►

Non Profit Corporation

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

1000 NE 16th Avenue, Bldg. I

6 City, state, and ZIP code

Gainesville, FL 32601

Requester's name and address (optional)

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

____ - ____ - ____

or

Employer identification number

5 9 - 1 7 9 7 4 9 9

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign
Here

Signature of
U.S. person ►

Melanie Gonyea

Date ►

1/06/2021

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

LEASE

THIS LEASE, made and entered into by and between 1000 NE 16th Ave Partners, LLC, hereinafter called "Lessor," and Three Rivers Legal Services, Inc., hereinafter called "Lessee":

DATA SHEET

A) Premises – Building I – Suite B, 1000 NE 16th Avenue, Gainesville, FL 32609

B) Rentable Area (approximately) 5,228 Sq. Ft.

C) Initial Security Deposit \$5,663.66

D) Base Rent: \$13.00 per square foot

Months	Annual Lease Rate	Monthly Rent
Rent Commencement -12	\$13.00/SF	\$5,663.66
13 - 24	\$13.33/SF	\$5,807.44
25 - 36	\$13.66/SF	\$5,951.21
37 - 48	\$14.00/SF	\$6,099.33
49 - 60	\$14.35/SF	\$6,251.82

Florida State Tax

Not Applicable

TOTAL

\$357,281.52

E) Initial Term

64 months

F) Lease Commencement

July 21, 2017

G) Rent Commencement

November 1, 2017

G) Termination Date

October 31, 2022

H) Premises Delivery Date

On or before
October 27, 2017

IN WITNESS WHEREOF, the parties have executed this lease under seal, as of
the 21 day of July, 2017.

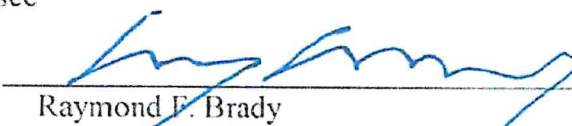
Signed, sealed and delivered
in our presence as witnesses:

1000 NE 16th Ave, Partners, LCC
Lessor

By: Tatonka Capital Corporation, its Managing Member

By:  EUP
Eric E. Gorka, Executive Vice President

Three Rivers Legal Services, Inc.
Lessee

By:  7/21/17
Raymond F. Brady

Title: President, Board of Directors

By:  7-21-2017
Christine E. Larson

Title: Executive Director



ADDENDUM PUBLISH DATE: April 1, 2021
RFP NUMBER: CRAX-210034-GD
PRE-BID MEETING DATE: March 31, 2021, 2:00pm et
QUESTIONS DUE: April 7, 2021, 3:00pm et
PROPOSAL DEADLINE: April 23, 2021, 3:00pm et

ADDENDUM NO. 1
Probate Legal Services for Heirs Property Program

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary.

1. Any questions regarding this solicitation shall be submitted in writing to the City of Gainesville (CoG) Procurement Division by 3:00pm, (local time), April 7, 2021, 2021, 3:00pm Eastern Time. Submit questions to: dykemangb@cityofgainesville.org
2. Please find attached:
 - a. A copy of the Cone of Silence period information (Financial Procedures Manual Section 41-424 Prohibition of lobbying in procurement matters) that was discussed.
 - b. A copy of the Pre-Bid Discussion/Information Checklist
3. Following is a review of the Pre-Bid Meeting that was held via Zoom Conference on March 31, 2021, 2:00pm Eastern Time:
 - a. City of Gainesville Staff represented by Gayle Dykeman, City of Gainesville Procurement Specialist III and Chelsea Bakaitis, Project Manager.
 - b. Gayle Dykeman started the meeting by reviewing important Procurement areas of the solicitation, including the solicitation schedule and submittal due date.
 1. Questions are due by April 7, 2021, 3:00pm
 2. All communication must go through Gayle Dykeman throughout the duration of the solicitation.
 3. Review of solicitation schedule, description of Bid Opening
 4. All submittals must be entered in DemandStar.com by the due date and time – DemandStar is programmed to reject any bids that are entered after that time. DemandStar is a free tool for vendors to submit bids. DemandStar will automatically close the solicitation at the specified date and time, and the City will not accept any late proposals, regardless of the format presented.
 5. Spoke about the rules guiding the Cone of Silence.
 6. Required forms – detailed in Meeting Checklist form attached
 - c. Chelsea Bakaitis provided an overview of the intent of the solicitation. Forthcoming program initiated by the City Commission. Pertains solely to GCRA neighborhoods. Reviewed the Project Specifications.



4. Following are questions and answers that were discussed in the meeting:

a. Question:

It looks like it will be possible that multiple attorneys may be awarded the contract?

Answer:

Yes, there will be a Primary and Secondary attorney. The Primary attorney will be assigned all cases until such time as the Primary is not able to handle the work load. The City will then begin to assign cases to the Secondary attorney.

b. Question:

How many cases do you anticipate need to be handled?

Answer:

There are currently 217 known cases in the district that need to be handled. In order to qualify, applicants need to have 120% of median income. The Contract term is for one year with 2 one-year extensions

c. Question:

How will cases be acquired? Is the attorney required to recruit cases or the City?

Answer:

It will be a mixture of both – the City is responsible for marketing, outreach, vetting and managing the applicants, but if the attorneys identify a potential program candidate, they would refer that candidate to the City to conduct the program engagement process.

d. Question:

Will the invoicing be per client? Per case? Monthly billing for hourly invoices?

Answer:

If invoicing is per client, then the invoice will be presented at the time the case is complete. If the billing is per hour, the invoice will be presented monthly, for all hours dedicated to the Program during the month. Q Bill hourly is monthly invoice

e. Question:

What kind of speed is expected? How many hours a week do you expect the vendor to dedicate to the program.

Answer:

The forthcoming heirs' property program is the first of its type for the City and so it is difficult to estimate the total number of applicants. The GCRA has proposed a \$250,000 budget toward the program in FY22, and an additional \$250,000 in proposed budget for FY23, for a total of \$500,000 over the next two fiscal years, (City fiscal years commence on October 1).



City of Gainesville
Budget and Finance Department
Purchasing Division

f. Question:

Has the City talked with Alachua County Probate judges for opportunities to expedite cases? There are also programs that may reduce the cost of a Probate case that are offered to income qualified individuals. Suggest looking into those programs and see how they might work with this Program.

Answer:

The City was not aware of these programs, but will definitely look into them as a way of enhancing the Program. For the purpose of the solicitation, consider it 'business as usual'.

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 1 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 1 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER COMPANY NAME: Three Rivers Legal Services, Inc.

SIGNATURE: Walter Anthony Wisz

LEGIBLY PRINT NAME: Walter Anthony Wisz

DATE: April 21, 2021



**CITY OF GAINESVILLE
FINANCIAL SERVICES
PROCEDURES MANUAL**

41-424 Prohibition of lobbying in procurement matters

Except as expressly set forth in Resolution 170116, Section 9, during the Cone of Silence as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees, except the Procurement Division or the procurement designated staff contact person. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Cone of Silence period means the period between the issue date which allows for immediate submittals to the City of Gainesville Procurement Division in response to an invitation to bid, or a request for proposal, or qualifications, or information, or an invitation to negotiate, as applicable, and the time that City Officials or the Procurement Division, or City Department awards the contract.

Lobbying means when a person seeks to influence or attempt to influence City Officials or employees with respect to a decision of the City, except as authorized by procurement procedures.



City of Gainesville
Procurement Division
200 E University Avenue, Rm 339
Gainesville, FL 32601
(352) 334-5021(main)

ADDENDUM 1 - ATTACHMENT A
PRE-BID DISCUSSION/INFORMATION CHECKLIST

BID NAME: Probate Legal Services for Heirs Property Program
BID NUMBER: CRAX-210034-GD
PRE-BID MEETING DATE: March 31, 2021; 2:00pm et
QUESTIONS DUE: April 7, 2021, 3:00pm et
PROPOSAL DEADLINE: April 23, 2021, 3:00pm et

_____ Introduce staff attending meeting – Gayle Dykeman, Procurement

_____ Questions/Answers and topics of discussion addressed at the pre-bid will be available through <https://www.demandstar.com/> in future Addendums. There is no cost to the vendor to use all vendor capabilities when bidding on a City of Gainesville solicitation.

- You can link to DemandStar through the City's website or direct to Demanstar.com <https://network.demandstar.com/for-government/>

_____ Any questions must be in writing

- Email to dykemangb@cityofgainesville.org
- Questions Deadline: April 7, 2021, 3:00pm

_____ All communication, contact and/or correspondence must be with dykemangb@cityofgainesville.org or CITY Purchasing Division staff.

- Bidders who have contact with anyone other than Gayle Dykeman or CITY Purchasing Division staff, (examples of "anyone other than": Department Staff, City Manager, City elected officials, etc.) will be disqualified.

_____ Bid Due Date: Friday, April 23, 2021 at 3:00PM et

_____ Location to receive bids: Demandstar.com.

_____ Bonds - ☐ YES ☒ NO

- If no, bring attention to State Statute of \$200,000

_____ Local Preference

_____ Small and Service Disabled Veteran Business Participation

_____ Living wage – **Does not apply to this Solicitation**

_____ Addenda

- Sign sheet included with each addendum and submit with bid

_____ **REQUIRED FORMS TO BE SUBMITTED**

1. RFP Cover Page (Page 1)
2. Bidder Verification Form (Exhibit B)
3. Exceptions to the RFP (refer to Part 4, 4.5 Exception to the RFP)
4. Drug-Free Workplace Form (Exhibit A)



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5. References Form (Exhibit C)
6. Certification of Compliance with Living Wage, if applicable to bidder (Exhibit E)
7. Bidder's W-9
8. Copy of any applicable current licenses and/or certification required by City/County/State
9. Copies of all Addenda, signed
10. Report of Alleged Wrongdoings, Litigation/Settlements/Fines

_____ Minimum Requirements (MUST or SHALL) - Be aware of or could be deemed non-responsive and not considered for award. Minimum Qualifications can be found on Page 7, 4.1.c.1

_____ Bid Information Form - If not bidding, please complete the No Bid form located in the Exhibits Section to advise the City of the reasons why your company is not submitting a bid.

RACHEL RALL, ESQUIRE

3225 University Blvd. South, Suite 220
Jacksonville, FL 32216

(904) 717-0833

Rachel.Rall@trls.org

PROFESSIONAL EXPERIENCE:

Three Rivers Legal Services, Inc.
March 2019 to Present

Staff Attorney representing primarily clients who seek to retain their ancestral homes, whether through probate, estate planning, or civil litigation, such as quiet title actions; also represent family law clients. Involvement with the HUG Workgroup, Pro Bono Committee Workgroup, Family Law workgroup, Naming Convention Workgroup.

Rachel Rall, Attorney at Law, P.A.

August 2009 to February 2019
Owner

Representing clients in dissolution of marriage, paternity, temporary custody, child support, dependency actions, as well as in probate, estate planning, and real estate litigation. Accepted court appointments as attorney ad litem for minors in dependency actions.

CERTIFICATIONS:

Florida Supreme Court Certified Family Mediator, 2011 to Present
Florida Supreme Court Appellate Mediator, 2018 to Present

EDUCATION:

Florida Coastal School of Law
January 2000 to December 2002
Juris Doctorate
Law Review – 2000-2002
Case Note Editor

Jacksonville University, Jacksonville, FL
January 1997 – December 1999
Bachelor of Science, Business Administration
Graduated Magna cum Laud

BAR ADMISSIONS:

Florida Bar – May 2003 to Present

Member of the Family Law Section, Real Estate Probate Law Section, Public Interest Law Section and Elder Law Section

Florida Family Law Inn of Court, Barrister, 2015 to 2019; Master 2020 to Present

U.S. Circuit Court of Appeals, Eleventh Circuit, 2009 to Present

U.S. District Court, Middle District of Florida, 2004 to Present

Candidate for Admission to the United States Supreme Court (scheduled for June, 2021)

PROFESSIONAL ASSOCIATIONS:

Jacksonville Bar Association

Chairman, Protecting Our Children Committee 2014-2015

Vice Chair, Mentoring Committee 2020-Present

Professionalism Committee

Family Law Committee

ADR Committee

Appellate Law Committee

Jacksonville Women Lawyers Association 2015 to Present

Catholic Lawyers Guild – 2003 to Present

Current President, 2020-2021

Vice President, September 2018 to 2020

Secretary, 2016 to 2017

President, 2014-2015

Vice President, 2013-2014

Florida Coastal School of Law, Alumni Association Board of Directors, 2014 to Present

September, 2016 – Present: Co Chair – Alumni Engagement Committee

Member, Board of Directors, Family Nurturing Center, September 2018 to Present

EXCEPTIONS TO THE RFP:

None; Not Applicable

REPORT OF ALLEGED WRONGDOINGS, LITIGATION/SETTLEMENTS/FINES:

None; Not Applicable