



December 3, 2024

**AWARD NOTICE
RP043-24**

Provision of Personal Property Assessment and Administration Program on a Multi-Year Contract

Pursuant to the proposals received on October 14, 2024 for RP043-24 Provision of Personal Property Assessment and Administration Program on a Multi-Year Contract, the proposal has been awarded to Tax Management Associates, Inc., in the amount of \$8,337,800.00. Please note the enclosed tabulation.

We appreciate your proposal and interest in Gwinnett County.

Sincerely,

A handwritten signature in black ink, appearing to read "Casey Beaston".

Casey Beaston
Purchasing Associate II

CB/bc

Enclosure

RP043-24
Provision of Personal Property Assessment and Administration Program on a
Multi-Year Contract
Department of Financial Services

			Tax Management Associates, Inc. (OS)	Traylor Business Services, Inc. (OC)
ITEM #	CRITERIA	POINTS ALLOCATED	TOTAL POINTS	TOTAL POINTS
1	Responsiveness of the proposal in clearly stating an understanding of the work to be performed, including making all required statements and affirmations.	25	24	19.5
2	Demonstrated experience at creating and managing projects of the nature being called for in this Proposal. Staffing and familiarity with Georgia property tax administration.	30	28	14.5
3	References	25	22	15
SUB-TOTAL		80	74	49
4	Cost Proposal	20	13.38	20
TOTAL		100	87.38	69

Recommended Vendor:

Tax Management Associates, Inc.
 Attn: Jennifer Casali
 5121 Parkway Plaza Blvd.
 Charlotte, NC 28217
 Phone: 704-847-1234
 Fax: 704-708-8400
Jennifer.Casali@tma1.com

Provision of Personal Property Assessment and Administration Program on a Multi-Year Contract

Department of Financial Services

			Tax Management Associates, Inc. (OS) ORIGINAL									
			YEAR 1		YEAR 2		YEAR 3		YEAR 4		YEAR 5	
ITEM #	DESCRIPTION	APPROX. QTY	Fee Per Account	Total	Fee Per Account	Total	Fee Per Account	Total	Fee Per Account	Total	Fee Per Account	Total
1	Business Personal Property Return Processing/Valuation/Personal Property Administration	17,500	\$49.00	\$857,500.00	\$51.00	\$892,500.00	\$53.00	\$927,500.00	\$55.00	\$962,500.00	\$57.00	\$997,500.00
2	Aircraft and Marine Personal Property Return Processing/Valuation/Personal Property Administration	1,300	\$24.00	\$31,200.00	\$25.00	\$32,500.00	\$26.00	\$33,800.00	\$27.00	\$35,100.00	\$28.00	\$36,400.00
3	Accounts Added in the Discovery Process	350										
4	Appeal of Marine Equipment or Aircraft Accounts	100	\$45.00	\$4,500.00	\$47.00	\$4,700.00	\$49.00	\$4,900.00	\$51.00	\$5,100.00	\$53.00	\$5,300.00
5	Business Account Appeals	300	\$115.00	\$34,500.00	\$120.00	\$36,000.00	\$125.00	\$37,500.00	\$130.00	\$39,000.00	\$135.00	\$40,500.00
6	Motor Vehicle Appeals	400	\$75.00	\$30,000.00	\$78.00	\$31,200.00	\$81.00	\$32,400.00	\$84.00	\$33,600.00	\$88.00	\$35,200.00
Business Personal Property Audit												
ITEM #	DESCRIPTION	APPROX. QTY	Fee Per Audit	Total	Fee Per Audit	Total	Fee Per Audit	Total	Fee Per Audit	Total	Fee Per Audit	Total
7	\$50,000 - \$499,999	250	\$850.00	\$212,500.00	\$885.00	\$221,250.00	\$920.00	\$230,000.00	\$960.00	\$240,000.00	\$1,000.00	\$250,000.00
	\$500,000 - \$999,999	50	\$1,600.00	\$80,000.00	\$1,675.00	\$83,750.00	\$1,750.00	\$87,500.00	\$1,825.00	\$91,250.00	\$1,900.00	\$95,000.00
	\$1,000,000 - \$4,999,999	40	\$2,750.00	\$110,000.00	\$2,875.00	\$115,000.00	\$3,000.00	\$120,000.00	\$3,125.00	\$125,000.00	\$3,250.00	\$130,000.00
	\$5,000,000 - \$9,999,999	10	\$6,750.00	\$67,500.00	\$7,050.00	\$70,500.00	\$7,350.00	\$73,500.00	\$7,650.00	\$76,500.00	\$8,000.00	\$80,000.00
	\$10,000,000 and greater	10	\$12,000.00	\$120,000.00	\$13,000.00	\$130,000.00	\$14,000.00	\$140,000.00	\$15,000.00	\$150,000.00	\$16,000.00	\$160,000.00
Total			\$1,547,700.00		\$1,617,400.00		\$1,687,100.00		\$1,758,050.00		\$1,829,900.00	
Five Year Total			\$8,440,150.00									

Provision of Personal Property Assessment and Administration Program on a Multi-Year Contract

Department of Financial Services

			Tax Management Associates, Inc. (OS) BAFO									
			YEAR 1		YEAR 2		YEAR 3		YEAR 4		YEAR 5	
ITEM #	DESCRIPTION	APPROX. QTY	Fee Per Account	Total	Fee Per Account	Total	Fee Per Account	Total	Fee Per Account	Total	Fee Per Account	Total
1	Business Personal Property Return Processing/Valuation/Personal Property Administration	17,500	\$49.00	\$857,500.00	\$51.00	\$892,500.00	\$53.00	\$927,500.00	\$55.00	\$962,500.00	\$57.00	\$997,500.00
2	Aircraft and Marine Personal Property Return Processing/Valuation/Personal Property Administration	1,300	\$24.00	\$31,200.00	\$25.00	\$32,500.00	\$26.00	\$33,800.00	\$27.00	\$35,100.00	\$28.00	\$36,400.00
3	Accounts Added in the Discovery Process	350										
4	Appeal of Marine Equipment or Aircraft Accounts	100	\$45.00	\$4,500.00	\$47.00	\$4,700.00	\$49.00	\$4,900.00	\$51.00	\$5,100.00	\$53.00	\$5,300.00
5	Business Account Appeals	300	\$115.00	\$34,500.00	\$120.00	\$36,000.00	\$125.00	\$37,500.00	\$130.00	\$39,000.00	\$135.00	\$40,500.00
6	Motor Vehicle Appeals	400	\$75.00	\$30,000.00	\$78.00	\$31,200.00	\$81.00	\$32,400.00	\$84.00	\$33,600.00	\$88.00	\$35,200.00
Business Personal Property Audit												
ITEM #	DESCRIPTION	APPROX. QTY	Fee Per Audit	Total	Fee Per Audit	Total	Fee Per Audit	Total	Fee Per Audit	Total	Fee Per Audit	Total
7	\$50,000 - \$499,999	250	\$835.00	\$208,750.00	\$870.00	\$217,500.00	\$870.00	\$217,500.00	\$940.00	\$235,000.00	\$980.00	\$245,000.00
	\$500,000 - \$999,999	50	\$1,560.00	\$78,000.00	\$1,625.00	\$81,250.00	\$1,625.00	\$81,250.00	\$1,755.00	\$87,750.00	\$1,755.00	\$87,750.00
	\$1,000,000 - \$4,999,999	40	\$2,700.00	\$108,000.00	\$2,800.00	\$112,000.00	\$2,900.00	\$116,000.00	\$3,020.00	\$120,800.00	\$3,140.00	\$125,600.00
	\$5,000,000 - \$9,999,999	10	\$6,650.00	\$66,500.00	\$6,900.00	\$69,000.00	\$7,175.00	\$71,750.00	\$7,475.00	\$74,750.00	\$7,775.00	\$77,750.00
	\$10,000,000 and greater	10	\$11,500.00	\$115,000.00	\$12,500.00	\$125,000.00	\$13,500.00	\$135,000.00	\$14,500.00	\$145,000.00	\$15,500.00	\$155,000.00
Total			\$1,533,950.00		\$1,601,650.00		\$1,657,600.00		\$1,738,600.00		\$1,806,000.00	
Five Year Total			\$8,337,800.00									

Provision of Personal Property Assessment and Administration Program on a Multi-Year Contract

Department of Financial Services

			Traylor Business Services, Inc. (OC)									
			YEAR 1		YEAR 2		YEAR 3		YEAR 4		YEAR 5	
ITEM #	DESCRIPTION	APPROX. QTY	Fee Per Account	Total	Fee Per Account	Total	Fee Per Account	Total	Fee Per Account	Total	Fee Per Account	Total
1	Business Personal Property Return Processing/Valuation/Personal Property Administration	17,500	\$27.75	\$485,625.00	\$28.25	\$494,375.00	\$28.75	\$503,125.00	\$29.25	\$511,875.00	\$29.75	\$520,625.00
2	Aircraft and Marine Personal Property Return Processing/Valuation/Personal Property Administration	1,300	\$15.00	\$19,500.00	\$15.00	\$19,500.00	\$15.00	\$19,500.00	\$15.00	\$19,500.00	\$15.00	\$19,500.00
3	Accounts Added in the Discovery Process	350	\$225.00	\$78,750.00	\$225.00	\$78,750.00	\$225.00	\$78,750.00	\$225.00	\$78,750.00	\$225.00	\$78,750.00
4	Appeal of Marine Equipment or Aircraft Accounts	100	\$30.00	\$3,000.00	\$30.00	\$3,000.00	\$30.00	\$3,000.00	\$30.00	\$3,000.00	\$30.00	\$3,000.00
5	Business Account Appeals	300	\$75.00	\$22,500.00	\$75.00	\$22,500.00	\$75.00	\$22,500.00	\$75.00	\$22,500.00	\$75.00	\$22,500.00
6	Motor Vehicle Appeals	400	\$45.00	\$18,000.00	\$45.00	\$18,000.00	\$45.00	\$18,000.00	\$45.00	\$18,000.00	\$45.00	\$18,000.00
Business Personal Property Audit												
ITEM #	DESCRIPTION	APPROX. QTY	Fee Per Audit	Total	Fee Per Audit	Total	Fee Per Audit	Total	Fee Per Audit	Total	Fee Per Audit	Total
7	\$50,000 - \$499,999	250	\$575.00	\$143,750.00	\$650.00	\$162,500.00	\$725.00	\$181,250.00	\$800.00	\$200,000.00	\$875.00	\$218,750.00
	\$500,000 - \$999,999	50	\$1,250.00	\$62,500.00	\$1,300.00	\$65,000.00	\$1,350.00	\$67,500.00	\$1,400.00	\$70,000.00	\$1,450.00	\$72,500.00
	\$1,000,000 - \$4,999,999	40	\$1,900.00	\$76,000.00	\$2,000.00	\$80,000.00	\$2,100.00	\$84,000.00	\$2,200.00	\$88,000.00	\$2,300.00	\$92,000.00
	\$5,000,000 - \$9,999,999	10	\$5,800.00	\$58,000.00	\$6,000.00	\$60,000.00	\$6,200.00	\$62,000.00	\$6,400.00	\$64,000.00	\$6,600.00	\$66,000.00
	\$10,000,000 and greater	10	\$7,500.00	\$75,000.00	\$8,250.00	\$82,500.00	\$9,000.00	\$90,000.00	\$9,750.00	\$97,500.00	\$10,500.00	\$105,000.00
Total			\$1,042,625.00		\$1,086,125.00		\$1,129,625.00		\$1,173,125.00		\$1,216,625.00	
Five Year Total			\$5,648,125.00									