



Notice of Intent to Award

| | | | |
|---------------------|---|-------------|--------------------------------|
| Solicitation Number | 380381 | Award Date | 10/2/2024 10:28 AM CDT |
| Solicitation Title | Death Audit and Address Search Services | | |
| Buyer Name | Scott Ferguson | Buyer Email | scott.ferguson@nashville.gov |
| BAO Rep | Christopher Wood | BAO Email | christopher.wood@nashville.gov |

Awarded Supplier(s)

In reference to the above solicitation and contingent upon successful contract negotiation, it is the intent of the Metropolitan Government of Nashville and Davidson County to award to the following supplier(s):

| | | | | |
|----------------|-----------------------------------|-----------------|-------------------|---------------|
| Company Name | ABL Technologies, LLC | Company Contact | Jean Carlo Oviedo | |
| Street Address | 2101 Park Center Drive, Suite 220 | | | |
| City | Orlando | State | FL | Zipcode 32835 |
| Company Name | | Company Contact | | |
| Street Address | | | | |
| City | | State | | Zipcode |
| Company Name | | Company Contact | | |
| Street Address | | | | |
| City | | State | | Zipcode |

Certificate of Insurance

The awarded supplier(s) must submit a certificate of insurance (COI) indicating all applicable coverage required by the referenced solicitation. The COI should be emailed to the referenced buyer no more than 15 days after the referenced award date.

Equal Business Opportunity Program

Where applicable, the awarded supplier(s) must submit a signed copy of the letter of intent to perform for any and all minority-owned (MBE) or woman-owned (WBE) subcontractors included in the solicitation response. The letter(s) should be emailed to the referenced business assistance office (BAO) rep no more than two business days after the referenced award date.

Yes, the EBO Program is applicable. No, the EBO Program is not applicable.

Monthly Reporting

Where applicable, the awarded supplier(s) will be required monthly to submit evidence of participation and payment to all small (SBE), minority-owned (MBE), women-owned (WBE), LGBT-owned (LGBTBE), and service disabled veteran owned (SDV) subcontractors. Sufficient evidence may include, but is not necessarily limited to copies of subcontracts, purchase orders, applications for payment, invoices, and cancelled checks.

Questions related to contract compliance may be directed to the referenced BAO rep.

Yes, monthly reporting is applicable. No, monthly reporting is not applicable.

Public Information and Records Retention

Solicitation and award documentation are available upon request. Please email the referenced buyer to arrange.

A copy of this notice will be placed in the solicitation file and sent to all offerors.

Right to Protest

Per MCL 4.36.010 – 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.

 Assistant Purchasing Agent (Initial)

Dennis Rowland
 Dennis Rowland
 Purchasing Agent & Chief Procurement Officer

| RFQ# 380381 - Death Audit and Address Search Services | | | | |
|---|------------------|--------------|----------------------|---|
| Evaluation Criteria | ABL Technologies | Guidehouse | INTERACTIVE DATA LLC | Longevity Holdings Inc dba Pension Benefit Services LLC |
| Round 1 | | | | |
| Solicitation Acceptance | Yes | Yes | Yes | Yes |
| Contract Acceptance | Yes | Yes | Yes | Yes |
| ISA Questionnaire Completed and Terms Accepted | Yes | Yes | Yes | Yes |
| Corporate Experience(20 Points) | 13 | 11 | 11 | 19 |
| Approach and Capacity (25 Points) | 23 | 18 | 15 | 25 |
| Reporting and Security (25 Points) | 25 | 10 | 24 | 25 |
| Cost (30 Points) | 25.41 | 9.96 | 30.00 | 8.24 |
| Totals | 86.41 | 48.96 | 80.00 | 77.24 |

Strength & Weaknesses

ABL Technologies

Corporate Experience(20 Points)

Strengths: Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses: Q#1 - Firm did not adequately explain the specific reasons why their firm is the most qualified and best choice to be awarded this contract. Q#2 - Firm did not document meeting the minimum 5 years experience under its current business name providing the services requested in this RFP. Q#3 - Firm has low number of clients for Death Audit Services. Q#5 - Firm has a low number of clients for address search services.

Approach and Capacity (25 Points)

Strengths: Firm's response addressed everything we requested in the RFP except for the weaknesses noted below. Q#3 - Firm's response to identifying high probability deaths on a weekly basis. Q#13 - Firm's description / the system/solution and its capabilities you use to conduct address searches. Q#14 - Firm's system gives Metro an ad-hoc portal service for single searches, as well as the option to upload files via SFTP for batch address cleanups.

Weaknesses: Q#11 - Firm's response to what their success rate in identifying deaths and what is their accuracy rate.

Reporting and Security (25 Points)

Strengths: Firm's response addressed everything we requested in the RFP.

Weaknesses: No weaknesses were noted.

Guidehouse

Corporate Experience(20 Points)

Strengths: Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses: Q#1 - Firm did not adequately explain the specific reasons why their firm is the most qualified and best choice to be awarded this contract. Q#3 - Firm did not respond to this question. Q#4 - Firm did not provide a minimum of 5 city and/or county clients that they provide death audit searches that are of similar size to Metro's pensioner, spouse and child dependents population. Q#5 - Firm has low number of clients for address search services.

Approach and Capacity (25 Points)

Strengths: Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses: Q#2 - Firms response states using Limited Access Death Master File (LADMF)" to conduct a death audit search. Q#3 - Firm's decedent database is updated frequently with high probability deaths dependent on the source and with the state database on a monthly basis from certain states. Q#5 - Firm did not provide specific answer to this question.

Reporting and Security (25 Points)

Strengths: Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses: Q#1 - Firm does not have a website available to the employer. Q#2 - Firm does not have a website available to the employer. Q#3 - Firm does not have a website available to the employer. Q#4 - Date encryption and retention appears to be a negotiated term.

Strength & Weaknesses

INTERACTIVE DATA LLC

Corporate Experience(20 Points)

Strengths: Firm's response addressed everything we requested in the RFP except for the weaknesses noted below. Q#5 - Firm's table with the number of clients you provide address search services and provide commentary on the year-to-year changes.

Weaknesses: Q#1 - Firm did not adequately explain the specific reasons why their firm is the most qualified and best choice to be awarded this contract. Q#2 - Firm did not answer this question. Q#3 - Firm did not provide number of clients for Death Audit Services. Q#4 - Firm did not provide a minimum of 5 city and/or county clients that you provide death audit searches that are of similar size to Metro's pensioner, spouse and child dependents population.

Approach and Capacity (25 Points)

Strengths: Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses: Q#2 - Firm's response providing a minimal list of sources you utilize to conduct a death audit search. Q#3 - Failed to confirm they can identify high probability death on a weekly basis. Q#4 - Firm did not adequately describe the system/solution and its capabilities you use to conduct death audit searches. Q#5 - Firm did not provide specific answer to this question. Q#6 - Firm's description on how they rank potential sources for the purposes of death validations. Q#8 - Firm does not provide Metro with the validated results. Q#10 - Firm states current obituary database is not comprehensive and uses two other data sets but did not verify alternative sources. Q#12 - Firm does not offer a preliminary mortality analysis to gauge what deaths might be currently overlooked. Q#13 - Firm did not adequately describe the system/solution and its capabilities they use to conduct address searches. Q#15 - Firm did not provide what data do they require from Metro to conduct address searches? Q#17 - Firm confirmed address verifications is not a primary function of their company's services.

Reporting and Security (25 Points)

Strengths: Firm's response addressed everything we requested in the RFP except for the weaknesses noted below.

Weaknesses: Q#7 - Firm's response to what formats are available to export the reporting results to Metro.

Longevity Holdings Inc dba Pension Benefit Services, LLC

Corporate Experience(20 Points)

Strengths: Firm's response addressed everything we requested in the RFP except for the weaknesses noted below. Q#1 - Firm's specific reasons why their firm is the most qualified and best choice to be awarded this contract. Q#2 - Firm exceeded meeting the minimum five (5) years of experience under its current business name providing the services requested in this RFP.

Weaknesses: Q#4 - Firm did not provide a minimum of 5 city and/or county clients that you provide death audit searches that are of similar size to Metro's pensioner, spouse and child dependents population.

Approach and Capacity (25 Points)

Strengths: Firm's response addressed everything we requested in the RFP. Q#13 - Firm's description of the system/solution and its capabilities you use to conduct address searches.

Weaknesses: No weaknesses were noted.

Reporting and Security (25 Points)

Strengths: Firm's response addressed everything we requested in the RFP. Q#3 - Firm confirms website does require multi-factor authentication (MFA) and also offers SSO at no additional cost.

Weaknesses: No weaknesses were noted.

| Solicitation Title & Number | | | RFP Cost Points | RFP SBE/SDV Points | Total Cost Points |
|---|------------------|------------------------------|-----------------|--------------------|-------------------|
| Death Audit and Address Search Services; RFQ# 370444 | | | 30 | 0 | 30 |
| Offeror's Name | Total Bid Amount | SBE/SDV Participation Amount | RFP Cost Points | RFP SBE/SDV Points | Total Cost Points |
| ABL Technologies, LLC | \$ 120,780.00 | | 25.41 | 0.00 | 25.41 |
| Guidehouse | \$ 308,100.00 | | 9.96 | 0.00 | 9.96 |
| INTERACTIVE DATA LLC | \$ 102,300.00 | | 30.00 | 0.00 | 30.00 |
| Longevity Holdings | \$ 372,510.00 | | 8.24 | 0.00 | 8.24 |