



OFFICE OF THE CLAY COUNTY PROPERTY APPRAISER

Honorable Tracy S. Drake, CFA, CAE, ASA, RES, AAS
State-Certified General Real Estate Appraiser RZ2759

1. In various sections, Clay County PAO uses the term "automated" (like in section 1.4 - "The Property Appraiser requires an automated homestead audit solution") and in multiple sections mentions "investigative" services. Our question is: Is Clay County looking for a data-oriented solution that automates the identification of unqualified exemptions, or a proposal that includes human-based investigation providing specific parcel-by-parcel recommendations of which exemptions should be removed? Our interpretation of the RFP is that Clay County PAO is looking for both.

Answer: Clay County is seeking investigative services to identify the possibility of ineligible exemptions that can interface with the Patriot AP5 CAMA system. Clay County will accept and evaluate all proposed solutions for implementation.

2. Is it anticipated that the initiative will include a mailing of questionnaires/affidavits to homeowners? In this process, homeowners above a certain threshold of confidence that are likely to be unqualified will receive a questionnaire/affidavit and be able to provide additional context towards why they may have been flagged for dual homesteads, rentals, deceased, etc flags. This is considered best practice and will reduce false positives.

Answer: It is anticipated that property owners who are identified as receiving unqualified exemptions will be notified with a request to provide information (within 30 days). If insufficient information is submitted, a tax lien may be filed, if warranted.

3. Clay County PAO has not included any terms in the proposal regarding proactively monitoring the parcels post initial audit. Is this a requirement of the proposal? Clay County will have spent a considerable amount of time to create an accurate exemption roll; maintaining its accuracy going forward is an opportunity for the office.

Answer: Proactive monitoring is not a requirement of the proposal; however, if the Contractor can provide the service then it should be listed in the response.

4. Does Clay County PAO have any custom datasets they would like us to include in the review of the homesteads? This could include returned mail, rental registrations from taxing jurisdictions, local (non-national) online rental sites relevant to Clay County, a list of active investigations, etc. These data will improve the performance of any solution that is capable of incorporating custom datasets.

Answer: This function will continue to be performed by the CCPAO.

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5. Clay County PAO has not included any requirements in the proposal about integrating into Clay County's CAMA system. Is this of interest to the county in its goal to maintain an accurate tax roll over time? Benefits to this integration are: 1) During the period of investigation the exemption status of properties may change and this information would be important to an investigation. 2) Any sold properties that have transferred to new owners would no longer require investigation, and 3) any investigation notes or flags identified by the automated solution could/should be available to the customer service representatives in the County's CAMA system.

Answer: All responses should specify if the proposed solution will integrate with Clay County's CAMA system: Patriot AP5. Data will be updated on a nightly basis.

6. Although a generalized version is available through the Florida DOR, could Clay County PAO provide a sample of a data extract from its CAMA system for vendor review? The data at <https://ccpao.com/parcel-information/> does not contain a data dictionary or exemption information from our preliminary review.

Answer: Sample data, including homestead information is available at [Parcel Information – Office of the Clay County Property Appraiser](#) (Ownership Data for Current Roll/CLView1(Property)) for all Contractor's to extract; however, demonstration of actual results is not a requirement for the initial response.

7. Does the County have a desired timeline for project delivery?

Answer: Clay County would like to begin reviewing the Contractor's results in the second half of 2021.

8. How many homestead exemptions are on the Clay County tax roll?

Answer: 53,967

9. What is the average single year tax dollar benefit of properties in Clay County claiming the Homestead Exemption?

Answer: Approximately \$589