PALM BEACH COUNTY TAX COLLECTOR'S OFFICE

Request for Information

FOR

Tax Platform Software System

RFI #2026-001

Release Date: November 13, 2026

Procurement Contact: **Mr. Andres Guerra Aizpurua**
Palm Beach County Tax Collector's Office
301 N. Olive Avenue
3rd Floor
West Palm Beach, FL 33401
Email: Procurement@pbctax.com

RFI – Tax Platform

Introduction

The **Tax Collector's Office (TCO) of Palm Beach County** seeks proposals for a comprehensive tax management solution serving a jurisdiction of **1.58 million residents** and **763,000 parcels**.

The TCO collects and distributes more than **$7 billion annually** across multiple tax types and fees. In FY2025, the office generated **$122 million** in revenue with **$46.8 million** in operating expenditure and maintained **358 budgeted positions**.

Key FY2025 operational volumes include:

- **2 million+ total transactions**
    - 720,000+ completed at six branch offices
    - 784,000+ completed online
    - 58,000+ via self-service kiosks
- **2 million+ website visits**
- **500,000+ pieces of incoming mail**
- **237,000+ phone calls**
- **45,000+ email inquiries**
- **1.99 million+ outbound mail pieces**

The TCO also serves as an agent for multiple Florida state agencies including the **Department of Highway Safety and Motor Vehicles**, **Fish & Wildlife Conservation Commission**, and the **Department of Vital Statistics**.

Request Overview

The TCO seeks a modern software platform capable of supporting end-to-end management of:

- Property tax
- Business tax
- Tourist development tax
- Tangible property tax

- FLDHSMV ORION transactions
- Other miscellaneous sales items

The solution must manage daily operations, client and parcel tracking, chain of custody workflows, transfer processes, payment status, and long-term data retention (up to **20 years**).

The platform must support complex tax life cycles, integrate with the TCO's financial system, and manage revenue distribution.

Functional Requirements

Tax Roll & Processing

- Fully automated processing aligned with **Florida Statutes**
- Automated workflow from property appraiser certification through bill creation and mailing
- Support for modern features such as e-billing, digital client profiles, and online bill pay

Data & System Architecture

- Cloud-based or on-premises deployment
- Real-time lookup capabilities
- Integration with high-speed mail processing systems

Cashiering

- Either an integrated cashiering module or full API compatibility with mainstream third-party cashiering solutions
- Ability to support **200+ concurrent cashiers**

Interagency & Vendor Integration

- Must support partnerships for:
    - Credit card processing
    - Tax certificate sales
    - Revenue recovery
- Must accommodate data exchange and potential solution replacement workflows

Vendor Qualifications

Vendors must demonstrate:

- Sufficient organizational capacity to support a project of this size
- A robust client base allowing for meaningful reference checks
- Experience servicing jurisdictions of comparable scale and complexity. Demonstrable, direct experience servicing governmental or institutional jurisdictions of comparable geographic scale, demographic complexity, and regulatory stringency.
- A demonstrated and verifiable, formalized commitment to a "customer first" operational ethos. The vendor must show that client satisfaction and end-user experience drive their business model, highlighted by proactive communication channels, rigorous accountability standards, rapid issue resolution, and a collaborative approach to long-term stakeholder engagement.

By submitting a high-level summary of how their software platform and company:

- Supports the items listed in the **Request Overview** section of this document
- Meets the needs described in the **Functional Requirements** section of this document
- Has demonstrated the ability to meet the **Vendor Qualifications** listed above

Summaries, and all communications with the TCO, must be directed to the "Official Procurement Contact":

Mr. Andres Guerra Aizpurua
Palm Beach County Tax Collector's Office
301 N. Olive Avenue
3rd Floor
West Palm Beach, FL 33401
Email address: procurement@pbctax.com
Note: include the words "RFP TAX PLATFORM" in email subject line

Contact with any member of the TCO about **ANY** aspect of this solicitation other than the Official Procurement Contact may result in the Respondent's disqualification.

The deadline for replying to this RFI is on or before 4:00 PM, EST on December 11, 2026.

Qualified vendors will advance to **Phase Two**, which includes:

- Technical specifications
- Detailed requirements
- Scoring matrix
- Additional documentation requests

Request For Information (RFI) Process

Vendor responses to this RFI will be reviewed by the TCO for informational purposes only and will not result in the award of a contract. The TCO will review the responses to determine the feasibility of issuing a competitive solicitation. Responding to this RFI does not prevent a vendor from being eligible to contract with the TCO.

Procurement Officer

The contact person listed below is the only individual authorized to respond to RFI-related comments and questions. If you contact any other individual within the TCO, your RFI response may be excluded from the TCO's review.

Andres Guerra
Palm Beach County Tax Collector's Office
Email: Procurement@pbctax.com

Addenda or Changes to the RFI

The TCO reserves the right to make changes to this RFI by posting addenda on the following site: www.pbctax.gov/rfi It is each vendor's responsibility to check for any posted addendum on the site.

Response Submission

Vendor responses to this RFI shall be completed and submitted ELECTRONICALLY to the **Procurement Contact, Andres Guerra** at the following email address: **procurement@pbctax.com**. Email delivery of responses must reference RFI No.: 2026-0001 in the subject line of the email response submission. The attachment shall be in a PDF format and contain no embedded or active links. Because of the limitation of electronic mailboxes, it is the responsibility of each vendor to meet all deadlines and confirm delivery of all information to the TCO.

Responses should be received by the TCO no later than the time and date noted in the RFI.

Disclosure of Response Contents

All documentation submitted as a response to the RFI will become the exclusive property of the TCO and will not be returned to the vendor. Responses received by the TCO may be disclosed pursuant to a public records request.

Confidential Response Materials and Redacted Submissions

If a vendor considers any portion of the documents, data, or records submitted in response to this RFI to be a trade secret, in order to preserve the confidentiality of the material, that vendor must clearly mark the document as a "Trade Secret" and simultaneously provide the TCO with a separate, redacted copy with only the trade secret portions of the document redacted and a brief description of the grounds for claiming exemption from public disclosure, including the specific statutory citation for the exemption.

In the event of a public records request, request for production, subpoena, or other demand for records to which documents that are marked as "Trade Secret" are responsive, the TCO will provide the redacted copy to the requesting party. If a requesting party asserts a right to the trade secret information, the TCO will attempt to notify the affected vendor that such an assertion has been made prior to releasing the information (unless otherwise prohibited by applicable law or court order). It is the vendor's responsibility to assert that the information in question is exempt from disclosure under chapter 119, Fla. Stat., or other applicable law. The vendor is responsible for defending its determination that the redacted portions of its documents, data, or records are trade secrets.

By submitting a response to this RFI, the vendor agrees to protect, defend, indemnify, and hold harmless the TCO for any and all claims arising from or relating to the vendor's determination that the redacted portions of its response are trade secret. If the vendor fails to mark any material as a "Trade Secret" or fails to submit a redacted copy of the information it claims is a trade secret, then such vendor acknowledges that the TCO is authorized to produce, without notice to the vendor, in their entirety, all documents, data, and records submitted to the TCO in response to a public records request, request for production, subpoena, or other demand for records.

Vendor Costs

Each Vendor is responsible for all costs associated with its preparation and submission of its response to this RFI, as well as any potential meeting with the TCO to discuss this RFI. The TCO will not be responsible for any vendor-related costs associated with this RFI.

Special Accommodations

Any person requiring special accommodation due to a disability should contact the TCO's

Procurement Contact, Andres Guerra. Requests for accommodation for a meeting must be made at least five (5) business days prior to the meeting.