

MuniReg, LLC Contact: Michael S. Halpern 27900 Chagrin Blvd. Ste. 225 Woodmere, OH. 44112 866-MUNIREG

MUNIREG PROPOSALP PINELLAS COUNTY, FL

" Foreclosure property registration services" project ID: 23-1122-RFP August 14th, 2023



To Whom it May Concern,

MuniReg LLC is pleased to submit its proposal for the administration of the subject programs. Though we too had no prior awareness of the dissolution and liquidation of the former vendor (ProChamps), we had witnessed several concerning aspects in their processes, from their founding through recent events. Those instances were a driving force in my founding of MuniReg in 2019.

This is a unique circumstance, with a leader (in quantity) in a very niche arena suddenly closing shop. We understand unique circumstances may require flexibility and unique and creative solutions With this proposal we intend to demonstrate that utilizing MuniReg is the optimal next step.

We hereby acknowledge that upon award of a contract and prior to commencing work MuniReg LLC will comply with all registration, licensing etc. requirements you may have.

I would like to conclude this introductory letter by stating that MuniReg LLC, is a continuation of my prior professional experience and serves as a valuable resource for local governments in the broader "blight fight". Though MuniReg is a for profit company, if you look into my personal background you will find someone who has a passion to help communities address blight, and specifically assist code enforcement personnel, to the best of my ability. (Please see Appendix C, which includes a letter from one of the nation's leading experts in community development).

Though price is a major determining factor, I humbly request the following four key items are also taken into consideration.

- In addition to the services MuniReg LLC is a knowledge center and hub for sharing new and developing issues and areas of concern from across the country, along with new and innovative solutions¹. This provides significant added value to our continuous professional collaboration and provides assurance we remain current and understand the pain points of municipal governments, especially code enforcement – the "boots on the ground" in the fight against blight.
- 2) My personal background in the area of "zombie foreclosures" is unmatched. Identifying "the bank" is step one, navigating their policies and procedures to achieve compliance with property maintenance standards. Not only do I have 20+ experience helping communities, I enjoy assisting communities.

¹ <u>https://www.munireg.com/thought-leadership/</u> <u>https://www.linkedin.com/newsletters/blight-alert-7056668829136924674/</u>



- 3) In this niche arena, there is one other entity. Though I prefer to stand on my own merit I would be remiss if I didn't point out that the principal is a former employee (general counsel) of ProChamps and among staff that transitioned over is a ProChamps key salesperson Kevin Sidella, with an interesting background². There are litigation matters between ProChamps and the principal of the other entity. Property Registration Champions, LLC v. Sidella³ PROPERTY VS BREAK POINT.⁴
- One key differentiator is MuniReg <u>will not</u> seek to collect fines and penalties for noncompliance.
 - a. A registry is a "a means to an end", with the goal being a maintained (hopefully occupied) property.
 - b. Aggressively pursuing non-compliance fines and penalties may not be in the municipality's best interest. i.e. property is maintained and owner contact information is available.
 - c. Allowing a 3rd party like MuniReg to pursue these fines and penalties creates an inherent "perverse incentive" that, regardless of assurances, is nearly impossible for you to protect against.

i.e. https://www.munireg.com/avoiding-a-perverse-incentive/

i.e. https://www.miamiherald.com/news/business/real-estate-

news/article273093655.html

MuniReg **will** provide you with all critical information. i.e. Address, contact information, date of non-compliance. This will allow **you** to make the determination whether to proceed.

We believe this to be a clear and fundamental philosophical difference with others in this space. Property registries serve a specific purpose. When leveraged beyond its intended purpose, (to increase revenue), negative consequences have arisen.

I would like to personally thank you for giving us the opportunity to provide this information and look forward to building a mutually rewarding partnership.

Sincerely, Michael S. Halpern President MuniReg LLC 866-MUNIREG mhalpern@MuniReg.com www.MuniReg.com

³ https://dockets.justia.com/docket/florida/flmdce/6:2022cv02355/409002

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² https://www.pennlive.com/midstate/2012/01/costopoulos_grills_sidella_as.html

⁴https://vmatrix1.brevardclerk.us/beca/Beca_Splash.cfm;jsessionid=F227202B20F5CC9EDB5A5 1E244F82BF3.cfusion?CFID=29795618&CFTOKEN=ac53a604fcadbd7a-F704DAED-5056-B465-1F1084B1A10A65F0



Technical Proposal

MuniReg LLC's proprietary web platform was developed specifically for the administration and management of property registration programs on behalf of local governments.

The platform has 3 distinct components:

- Municipal Client Portal
- Registering Party Portal
- MuniReg Administrative Portal

The platform provides for registration, renewals, de-registration, and associated fee processing of properties.

<u>Onboarding</u>

- MuniReg LLC
 - Platform will be customized to include a registration form corresponding to your requirement.
 - Account creation and website navigation training to be provided to staff. Creation of reports and frequency in collaboration with relevant staff
 - Proactive outreach will be conducted to all relevant registering parties i.e. banks, mortgage companies and their agents
 - Request of prior registration data for upload i.e. for renewal purposes
 - Request of additional property data i.e. property you may be aware of that require registration that have not been registered

Ongoing

- MuniReg LLC
 - Proactive daily review of potential properties that require registration.
 - Identification of entity that is required to register and proactive outreach to ensure compliance.
 - Submission of your portion of registration fees quarterly (unless you have a different requirement)



 Dedicated Client Manager will be assigned with direct oversight by Operations Manager Sarah Sizer who reports directly to company founder and President, Michael Halpern. Dedicated staff will be allocated to ensure constant and timely performance.

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Municipal Client Portal

Please find additional technical details in Appendix A

Company and Principal Background

- MuniReg LLC was founded in January 2019 with offices in Northeast Ohio to assist local governments in implementing and administering property registration programs.
- Principal, Michael Halpern has combined 20+ years' experience working with "zombie foreclosures and vacant abandoned property.
- Prior to founding MuniReg LLC, Halpern spent 17+ years at Safeguard Properties, the nation's largest mortgage field services company, and what we believe to be one of the largest historical "registrants" of foreclosure properties in your community.
- Final 8 years at Safeguard Properties, Halpern served as Director of Community Initiatives.
 - Assisting local governments with identifying and communicating with banks and mortgage companies
 - Educating municipal staff on the policies and procedures of the banking industry as it pertains to foreclosure and the properties serving as collateral for a mortgage loan. See Appendix B.
 - Collaborating with municipal staff to navigate the banking industry to achieve positive outcomes.



- Recipient of award/recognition⁵ from American Association of Code
 Enforcement
- Created, developed and maintained the Mortgage Servicer & Property
 Preservation Contact List⁶
- Halpern's experience, knowledge and relationships is absolutely unique and unsurpassed.

MuniReg Advantage

- MuniReg LLC takes a holistic view of the issues of blight faced by local governments and offers collaboration and solutions. MuniReg's bi-monthly newsletter covers a broad array of blight related topics, creative solutions along with emerging concerns. This allows MuniReg LLC to retain its "pulse" on nationwide developments providing a stronger partner for its municipal clients.
- In collaboration with appropriate staff, we will identify and communicate the data with other departments or entities for the betterment of your community. For example, ensuring the data is used in homeowner outreach to prevent foreclosures and abandonment of the property, and share with first responders to mitigate potential injury or loss of life.
- Constant review of ordinance language and/or requirements from across the country and share learnings with your team.
- The banking, or more specifically the mortgage servicing industry, was not designed for interaction with local governments. The banking industry is diverse and fragmented. Having a broad understanding of the dedicated segment of the industry referred to as "default servicing" and/or "property preservation" is critical. This knowledge is not only timesaving but cost saving.
 - Understanding why some banks act, why some do not, and why not.

⁵ https://dsnews.com/news/01-06-2016/safeguard-properties-receives-partnership-award-from-code-enforcement-agency

⁶ https://safeguardproperties.com/wp-content/uploads/2021/08/Mortgage-Servicer-Property-Preservation-Contacts_5.21.pdf



- Are there legitimate reasons why maintenance actions are not being taken or is it simply non-compliance?
- Are they the "final say" or is there other layers, including federal entities such as HUD, VA, Freddie Mac and Fannie Mae?
- How do these entities impact decisions "on the ground" those that are most relevant to you.

These are real questions. By knowing the answers for each individual property will ensure you are not getting the "run-around" and your time and effort are focused appropriately.

Client Information

MuniReg's client's and (points of contacts) as of this submission are:

- Anniston, AL
 - o Tana Bryant
 - o 256-231-7733
 - o <u>tbryant@annistonal.gov</u>
- Lower Burrell, PA
 - o Mark Marmo
 - 724-335-9875
 - o <u>mmarmo@cityoflowerburrell.com</u>
- New Kensington, PA
 - o Janie Spataro
 - o (724) 337-4523
 - o <u>cityclerk@newkensingtons.org</u>
- Coshocton, OH
 - o Mark Sharrock
 - o (740) 622-1465
 - o mark.sharrock@cityofcoshocton.com
- Crestline, OH



- Corey Spackey
- o 419-683-3800
- o <u>cspackey@crestlineoh.com</u>
- Braddock, PA
 - o Glenn Terry
 - braddockmanager@comcast.net
- Fleetwood, PA
 - Chris Young
 - o 610-944-8220
 - o <u>chris.young@fleetwoodboro.com</u>

Cost Proposal

MuniReg LLC will receive the registration fees (in conjunction with the registration information). MuniReg LLC will charge each applicant no more than the amount prescribed by your code. Firm will remit your portion of the registration fee as identified by contract, retaining one hundred dollars (\$100) for each registration and renewal.



Appendix A

MuniReg LLC Web Platform

MuniReg LLC's proprietary web platform was developed specifically for the administration and management of property registration programs on behalf of local governments. The development of the software focused on increasing efficiencies and productivity in order to maximize the effectiveness of the registry.

The platform has 3 distinct components:

- Municipal Client Portal
- Registering Party Portal
- MuniReg Administrative Portal

Municipal Client Portal

The Client Portal allows for ease of access for designated staff.

MuniReg understands that Client staff require full transparency and access to all relevant data. Therefore, the data is available through customizable reporting along with direct access.

For example, Client may request monthly reporting of all registered properties. However, an emergency may arise at a newly registered property and contact information is required. Direct access to this information is always available independent of reporting.

Please see following graphics with their respective descriptions.

Easy login from MuniReg LLC homepage www.munireg.com





	MuniReg	
	EMAIL admin@municipal.com	
\rightarrow	PASSWORD	
	FORGOT PASSWORD?	
-		
	First time? Create an account	9

Dashboard/Landing Page

Providing a snapshot of registration activity, reporting along with ability to search for individual registrations



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Dashboard	Hi Admin Municipal	
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Additional web pages include

- Individual Staff Profile Management
- All Registered Properties
- Properties Management
- Reports ***Please note descriptions on graphic for the available basic reporting
- User Management (Municipal Admin has ability to add or delete users and their access)
- General Municipal/Client Profile Management

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Dashboard		Manager
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Reports	Email *	Phone *
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Contact	City *	Zip Code * 44121
	State *	Country *
	Choose An Option	▼ United States ▼

Registrations	Created Date	△ ▼	Showing 1 - 4 of 4 items		Page 1	City
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Registering Party Portal

Efficiencies and ease of use for parties required to register, provides MuniReg's municipal clients with expedited results and increased compliance.

Please see following graphics with their respective descriptions.



Dashboard/Landing Page

Providing snapshot of properties requiring registration or renewal, reporting, along with financial information.

MuniReg 🔅 🛈	${f Q}$ Search registrations, properties, invoices and	users		+
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	2 20	,.	Past Due Invoices All past due invoices	

Additional web pages include

- Individual Staff Profile Management
- Registration Activity
- Properties Management

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- Invoice Management
- Reports
- User Management (Admin has ability to add or delete users and their access)
- General Registering Party Profile Management

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O My Account					
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	City *		Zip Code *		
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🔀 Contact		example1.com;example2.com	
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MuniReg Administrative Portal

MuniReg's Administrative Portal provides MuniReg's staff the ability to manage the administration of the registry, including;

- Initial set-up of municipal client and authorized users
- Initial set up of required fields on registration forms
- Creation of properties requiring registration
- Quality control of registrations

Appendix B

The fight against blight requires multiple creative strategies. Two strategies offered by MuniReg are experience and relationships. MuniReg's leveraging of Halpern's experience and relationships will help cultivate new solutions and replicate proven results.

Halpern, as a subject matter expert, has been honored as a speaker at numerous regional, state and national conferences, including:

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- American Association of Code Enforcement
- National Housing Conference
- National League of Cities
- Center for Community Progress (formerly National Vacant Properties Campaign)
- International Code Council
- Local Government Academy
- Federal Reserve Bank of Cleveland (Problem Properties Series Webinar)
- Housing Alliance of Pennsylvania
- Ohio Community Development Corporation
- State Code/Building Official Associations in AL, AZ, CA, CT, CO, FL, ID, IL, KS, KY, MI, OH, OK, MS, NY, TN, TX, UT, WA & WY

Additionally, Halpern has had several published articles directly related to foreclosure registries and blight.

- ICMA/American City & County (June 2021)
- American City & County (Feb 2020)⁸
- American City & County (Apr 2020)⁹
- Servicing Management¹⁰

⁷ <u>https://icma.org/articles/pm-magazine/broader-perspective-greater-results-addressing-foreclosed-vacant-and-abandoned-properties</u>

⁸ <u>https://www.americancityandcounty.com/2020/02/26/municipal-leaders-should-improve-registration-programs-to-combat-property-blight/</u>

⁹ <u>https://www.americancityandcounty.com/2020/04/21/post-covid-19-property-maintenance-responsibility/</u>

¹⁰ <u>https://safeguardproperties.com/michael-halpern-proposes-top-down-bottom-up-approach-to-community-outreach/</u>



- Housing Wire¹¹
- **DSNews**
- <u>National Mortgage News</u>

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¹¹ https://safeguardproperties.com/michael-halpern-proposes-top-down-bottom-up-approach-to-community-outreach/



Appendix C

Personal References (3)

December 27, 2019

I have known Michael Halpern for over 20 years. He is professional and knowledgeable of the everchanging housing regulations. I highly recommend Michael Halpern and his company MuniReg LLC. Michael has vast experience and knowledge in the housing sector and is a pleasure to work with. His services are needed especially in municipalities that do not have the resources to accurately track vacant properties.

Michele Weiss Vice Mayor, City of University Heights, Ohio (216) 509-3568

January 8, 2020

To whom it may concern:

As a senior fellow with the Center for Community Progress and author of Bringing Buildings Back, I have been engaged with issues of problem and vacant properties for over twenty years. I have known Michael Halpern for most of that time, first when he was employed at Safeguard Properties and more recently since his establishment of his own firm, MuniReg.

I have the highest regard for Michael and his work. He is a thoughtful person, extremely knowledgeable about the many different issues associated with problem properties. He has a broad understanding of the complex issues of public regulation of vacant and problem properties and the dynamics of establishing effective strategies on the ground. His services can be of great value to local governments as well as others trying to deal with their challenges in this area.

Alan Mallach, FAICP PO Box 623 Roosevelt NJ Office: 609.448.5614 Cell: 609.306.0308 Email: amallach@comcast.net

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December 30, 2019

To Whom It May Concern,

As an industry leader in the registration of vacant, abandoned and/or foreclosed properties we have registered tens of thousands of properties with thousands of independent municipalities. We have experienced hurdles and challenges with some of these programs that affect the ability to comply in a timely fashion. Additionally, due to specific nuances inherent to these properties, we occasionally encounter concerning language and/or requirements that increase liability for all parties.

These concerns exist in instances where a municipality implements and administers a program directly, but also where third-party assistance is utilized.

I have known Michael Halpern for many years. Michael, while at Safeguard Properties spent many years working to assist local governments in identifying and communicating with banks and mortgage companies, the basis of registration ordinances.

Michael has vast experience and broad knowledge in the larger mortgage servicing arena, and of course, registration ordinances.

Michael understands that the municipality's primary objective is compliance, and that by enabling parties like Bron to easily register, it is a "win-win" for all parties.

I highly recommend Michael Halpern and his company MuniReg. Any municipality will benefit immensely by collaborating with MuniReg for the administration of their registry. Please do not hesitate to reach out, as I know Michael and MuniReg will make a great partner for you.

Kevin Hamilton President, Bron 877-338-3791 Kevin.hamilton@broninc.com

VENDOR SUBMITTAL ACKNOWLEDGEMENT FORM

It is the policy of Pinellas County, Board of County Commissioners, to accept the lowest responsive and responsible or highest ranked submittal received meeting specifications. No changes requested by a vendor due to an error in pricing will be considered after the advertised solicitation opening date. By signing this Vendor Submittal Acknowledgment Form, vendors are attesting to their awareness and acceptance of this policy and agreeing to all solicitation of terms and conditions, including any insurance requirements.

Vendor Name (as shown on W-9): MuniReg, LLC Doing Business As (DBA) (if applicable): N/A Mailing Address (as shown on W-9): 27900 Chagrin Blvd. Suite 225 City, State, Zip (as shown on W-9): Woodmere, OH 44122 Vendor Email (primary company email): admin@munireg.com Remit to address (as shown on vendor invoice): 27900 Chagrin Blvd Suite 225 Woodmere OH 44122 Federal Tax ID (FEIN) #: 27-6485846 Vendor Contact Information

Contact Name: Michael Halpern

Phone Number: 216-402-7464

Email Address: mhalpern2@munireg.com

Payment Terms: Net 45 (per Florida Statute F.S. 218.73) N/A % N/A Days

Deposit (if required) has been paid in the amount of \$ N/A

Proper Corporate Identity is needed for a firm registered with the Florida Division of Corporations. Please visit dos.myflorida.com/sunbiz/ for this information. It is essential to return a copy of your W-9 with your submittal.

I hereby agree to abide by all conditions of this solicitation, including all insurance requirements, and certify that I am authorized to sign this solicitation for the vendor.

Authorized Signature:

Print Name: Michael Halpern

Title: President

THIS FORM MUST BE RETURNED WITH YOUR RESPONSE