1. **BACKGROUND**
   1. Lake County Fire Rescue provides and receives fire-related services within specific geographical areas of various municipal boundaries through a financial reimbursement formula based on specific emergency incidents and resource types. This reimbursement between municipalities and the county is settled on a recurring monthly basis.
   2. The County’s current funding comes from three main sources of revenue to provide public safety services.
      1. There is a county-wide ad valorem MSTU assessment levied on all municipal and unincorporated Lake County properties for Emergency Medical Services (EMS) transport services.
      2. Lake County collects from two revenue sources for providing fire suppression, non-transport EMS services. There is a Fire ad valorem MSTU assessment levied on all unincorporated Lake County properties for emergency fire/rescue services.
      3. In addition, there is a non-ad valorem Fire Assessment fee billed to all unincorporated Lake County properties for emergency fire/rescue services.
2. **SCOPE OF SERVICES**
   1. Consultant shall conduct a comprehensive strategic review of the current funding sources and recommend the future funding model with consideration to the blending of two separate emergency public safety entities merging into one agency.
   2. Consultant shall recommend a sustainable and reliable revenue funding model utilizing recognized best practices for fire and EMS emergency service delivery in Lake County, Florida.
   3. The recommended funding model could encompass an enhancement of the current funding model, or a completely new revenue funding model to fund the blended EMS transport and Fire services into one funding model without violating a “dual-taxation: scenario in areas of municipal-provided fire protection.
   4. The outcome desired is for the recommended revenue funding model will adequately fund the current and future resource demands for the County to provide emergency service delivery for fire, rescue, and EMS transport to nationally accepted standards related to staffing, apparatus/equipment, and public safety facilities within the constraints of readily available data and current legal precedent.
   5. Consultant shall work under a lump sum professional fee arrangement based on a schedule of payments.
      1. Consultant shall submit a proposed payment schedule with the initial proposal response.
      2. Consultant shall also submit a list of project deliverables and their delivery schedule for the cited deliverables with their initial proposal response.
3. **DELIVERY REQUIREMENTS**
   1. The following deliverables will be required during this project:
      1. Using the current model of established operational revenue sources for Fire/Rescue and EMS transport services using the County's ad valorem tax roll database; determine and report out the strengths and weaknesses of this funding model.
      2. Recommended plan of implementation for number of fiscal years to resource enhancements to correct any resource deficiencies identified by this project.
      3. Description of the current apportionment methodology and assessment rate calculation for both EMS transport and fire-rescue (non-transport) service delivery in the jurisdictional areas of responsibility.
      4. Develop a billing algorithm formula for the Fire Assessment Fee for both residential and commercial properties respectively, that utilizes the developed square footage of property from the Lake County Property Appraiser database to calculate a fair and equitable fire protection assessment for providing fire suppression resources to nationally accepted standards identified in this project.
      5. This project must specifically include the Lake County Property Appraiser database information and provide the detailed revenues collected utilizing the recommended Fire Assessment Fee algorithm formula proposal in actual spreadsheet format in full and sufficient detail to enable County staff to input information to the Lake County Tax Collector’s billing system. The proposed algorithm formula shall be designed to meet the future fiscal year needs to meet an increase or decrease of required revenues to meet the nationally recognized resources necessary for Fire, Rescue, and EMS transport emergency services.
      6. Notwithstanding the current revenue collection models in the County for EMS Transport and Fire Rescue services, the Consultant shall have the expectation and autonomy to develop a comprehensive new revenue collection model for funding the blended Lake County Fire Rescue Department services under one agency that complies with established law and statutory requirements and provisions.
      7. Draft implementing resolutions for the annual assessment/revenue collection model.
      8. Complete the project within the timelines necessary for the County to implement the final project recommendations in fiscal year 2024/2025 beginning October 1, 2024.
      9. The statutorily required notice and billing documentation that is required for using the tax bill collection method for the annual assessment program; and,
      10. An assessment roll in an electronic format that will merge with the County's real property tax roll in conformity with the requirements of the uniform method of collection proposed in this final revenue funding project for Lake County Fire Rescue Department.
   2. If the Consultant chooses to pursue a Fire Assessment Fee funding approach, in whole or a portion thereof, the project must utilize a minimum fee cost and a square footage formula from the Property Appraisers database for the basis of a fair and equitable formula methodology that escalates cost with increase square-footage. County staff will provide the necessary organizational information needed for the evaluation and completion of this project. If the County and the Consultant agree there is insufficient data or information available for this project to develop alternative methodologies, County staff will be responsible for providing the additional data or direction to the Consultant. The County will be an active participant and provide the necessary budget information, current Fire, Rescue, EMS transport resource information related to staffing, apparatus/equipment, and facilities, fire call data, jurisdictional/municipal boundaries for fire protection, and recognized national Fire and EMS authorities for acceptable standards that will be required to develop the assessment of resources and funding methodology. The County will also be responsible for conducting fieldwork for missing ad valorem tax roll information or other needs that arise for the Consultant to provide the necessary information for this project.
   3. Unless otherwise amended in writing, the performance period for completion of the initial study effort must not exceed two hundred forty-five (245) calendar days. The performance period for any subsequent update to the initial study must not exceed sixty (60) calendar days. The following task list is provided as a guide to delineate all services required by the County:
      1. Task 1: Evaluate Fire and EMS resources: Provide a comprehensive evaluation (gap-analysis) of the current state of the County’s fire, rescue, and EMS transport emergency service delivery capabilities compared to recognized and acceptable national standards related to personnel staffing, apparatus/equipment, and public safety facilities under the jurisdictional areas of responsibility.
      2. Task 2: Identify Fire and EMS resource deficiencies: Provide resource recommendations (plan-of-action) for any deficiencies related to fire, rescue, and EMS transport resources (if any), related to personnel staffing, apparatus/equipment, and public safety facilities (if any), to align with nationally recognized standards under the jurisdictional areas of responsibility.
      3. Task 3: Identify costs of additional resource needs: Detailed assessment of dollar-costs associated with correcting resource deficiencies (if any), in the Lake County Fire Rescue Department emergency service delivery system.
      4. Task 4: Evaluate the total Fire and EMS transport service delivery costs: Using current and proposed resource enhancements to correct fire and EMS deficiencies related to staffing, apparatus/equipment, and facilities determine total anticipated methodology for cost-of-service delivery.
      5. Task 5: Provide comparative Florida Fire and EMS jurisdictions: Provide other Florida fire departments of comparable size and scope of emergency service delivery, to that of Lake County Fire Rescue Department delivery model. The comparison should include at a minimum, the respective annual funding collection model used, annual revenue $ amount collected, and the jurisdictional demographic similarities and differences of both the community served and the Fire/EMS emergency services system.
      6. Task 6: Develop Revenue Methodology: Using the previously stated needs of this project, provide a sustainable and reliable annual collection revenue model that is compliant with case law and all statutory requirements and provisions. If a Fire Assessment Fee model is utilized, develop a billing algorithm formula for the Fire Assessment Fee for both residential and commercial properties respectively that utilizes a minimum fee to increase based on the developed square footage of property from the Lake County Property Appraiser database to calculate a fair and equitable fire protection assessment for providing fire suppression resources to nationally accepted standards identified in this project.
      7. Task 7: Determine Revenue Implementation Requirements: Advise the County in determining the total fire service revenue methodology and the requirements to ensure the County recovers the costs of: (a) net fire service delivery revenue requirements, (b) implementing the program, and (c) collecting the assessments.
      8. Task 8: Develop Preliminary Assessment Roll Database: Using the current ad valorem tax roll and fire special assessment roll, property appraiser database creates a preliminary assessment roll database to cover the total costs from Task 4 of this RFP. Test the sufficiency of the database by developing reports to access property information.
      9. Task 9: Apply Apportionment Methodology to Database: Apply the apportionment methodology to the preliminary assessment roll database to test the data validity and legal sufficiency. Revise the apportionment methodology as necessary.
      10. Task 10: Calculate a Preliminary Proforma Schedule of Rates: Using the developed recommended revenue proposal, calculate a proforma schedule of rates based on the developed apportionment methodology and revenue requirements for the assessment program developed
      11. Task 11: Prepare and Present Assessment Memorandum: Prepare and present an Assessment Memorandum that fully supports and justifies the proposed apportionment methodologies and proforma assessment rates in the Lake County Fire Rescue Department revenue proposal.
      12. Task 12: Assist with Assessment Resolutions: Advise and assist the County's legal counsel in drafting the preliminary and final assessment resolutions that conform to the assessment ordinance and that implement the County's policy decisions, proposed methodology and adopts final assessment rates.
      13. Task 13: Assist with Rate Adoption Process: Advise and assist with fulfilling the legal requirements for the adoption of the final assessment rate resolution and certification of the assessment roll in accordance with Section 197.3632, Florida Statutes as required.
      14. Task 14: Option to conduct periodic review and update of the initial study effort: Consultant shall provide all effort to update the initial study based on the most current demand data to examine, and either confirm or amend, the fire assessment value established during this project effort.
      15. Task 15: Present Final Project to the Lake County Board of County Commission: Provide a scheduled presentation on the final project before a future Lake County Board of County Commissioner meeting at the conclusion of the accepted project.
4. **COUNTY RESPONSIBILITIES**
   1. The County is responsible for any newspaper publications, including, but not limited to, arranging for publications and any costs associated with those publications.
   2. The County is responsible for any costs incurred to obtain information from the property appraiser or other public officials that is necessary for the assessment program.
   3. The contract will provide for a term of up to five (5) years. This operational period has been selected to enable the County, after completion of the initial study effort, to:
      1. Exercise, as determined to be required, the optional effort included within the pricing table for periodic updates based on the most current historical or other associated data to support continued accuracy of fee assessments, and
      2. Provide a structure enabling the Consultant to provide, at the hourly rates specified in the pricing table, technical and representative support regarding any litigation defense services that may be required during the stated duration of the contract.

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