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 that is based on the amount of 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. A county-wide ad valorem MSTU assessment levied on all municipal and unincorporated Lake County properties for Emergency Medical Services (EMS) transport services.
      2. A Fire ad valorem MSTU assessment levied on all unincorporated Lake County properties for emergency fire/rescue services.
      3. A non-ad valorem Fire Assessment fee billed to all unincorporated Lake County properties for emergency fire/rescue services.
   3. The County desires to engage a Public Safety Consultant to determine more accurate and appropriate financing formulas that are based on property and building square footage data collected by the Lake County Property appraiser.
2. **SCOPE OF SERVICES**
   1. Consultant shall work under a lump sum professional fee arrangement based on a schedule of payments to complete the tasks outline in Paragraph 3.2.
      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. Utilize the County approved formula to calculate the annual Fire Assessment Fee. Information from the Lake County Property Appraiser property database and the County ad valorem tax roll database shall be used to update the non-ad valorem Special Assessment database and formula in calculating the annual Fire Assessment fee. for
      2. Provide a review of the annual collection methods to ensure they meet all statutory and legal requirements.
      3. Develop and certify the annual fire assessment tax roll, which includes all Property use categories. Ensure deadlines are met for TRIM notices and certification of the Final Tax Roll as needed for inclusion in the annual July TRIM notice deadline and at County’s request.
   2. Unless otherwise amended in writing, the performance period for completion of the initial study effort must not exceed one hundred twenty (120) 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 Reports and Research Issues:** Evaluate the County’s documents, ad valorem tax roll information, fire call data, agreements, reports and other data pertaining to the provision of fire rescue services.
      2. **Task 2: Update Apportionment Methodology:** Using the current ad valorem tax roll and fire incident data reported to the State Fire Marshal, update the method of apportionment, classification of properties and the use of the data on the assessment roll. Review the assessment methodology for legal sufficiency and compatibility with the tax bill method of collection.
      3. **Task 3: Determine Preliminary Revenue Requirements:** Advise the County in determining the total fire service assessment revenue 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.
      4. **Task 4: Develop Preliminary Assessment Roll Database:** Using the current ad valorem tax roll and fire special assessment roll, create a preliminary assessment roll database. Test the sufficiency of the database by developing reports to access property information.
      5. **Task 5: 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 to provide a final product to be utilized for certification.
      6. **Task 6: Calculate a Preliminary Proforma Schedule of Rates:** Using the developed assessment roll, calculate a proforma schedule of rates based on the developed apportionment methodology and revenue requirements for the assessment program .
      7. **Task 7: Prepare and Present Assessment Memorandum:** Prepare and present an Assessment Memorandum that fully supports and justifies the proposed apportionment methodologies and proforma assessment rates.
      8. **Task 8: 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.
      9. **Task 9: 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.
      10. **Task 10: As directed by the County, conduct periodic review and update of the initial funding study effort:** Consultant shall provide all efforts to update the initial funding study based on the most current information gathered in this resource evaluation study to examine and either confirm or amend, the fire assessment value established during this project effort.
      11. **Task 11: Present final project to the Lake County Board of County Commissioners:** Provide a comprehensive written report and schedule an in-person oral presentation on the final project at a future Lake County Board of County Commissioner meeting concerning the current state of LCFR resources, recommendations on what is needed, implementation plan of three (3) and four (4) fiscal years to eliminate deficiencies identified, and the projected costs associated with the implementation of this 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 all reasonable 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 funding formula or fee assessments, and
      2. Provide a payment structure enabling the Consultant to provide, at the hourly rates specified in the pricing table, technical and representative support regarding any litigation that may be required during the stated duration of the contract.

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