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April 8, 2020

**Via Electronic Mail**

Anne Brown  
Levy County Attorney  
612 East Hathaway Avenue  
Bronson, Florida 32621

Re: **Revised Proposal for EMS, Fire Protection, Road Maintenance and Solid Waste Assessment Programs**

Dear Anne:

Levy County (the "County") has now completed another year of the annual assessment programs for fire protection, road maintenance, solid waste and EMS assessment services. Nabors, Giblin & Nickerson, P.A. ("NG&N") is pleased to have assisted the County with this recurring revenue source and as such, we believe that the County would benefit from a continuation of our services.

As in the past, NG&N proposes to utilize Government Services Group, Inc. ("GSG"), for the provision of rate consultant services; however, at the County's direction NG&N can retain an alternate rate consultant. This direction may require an adjustment in the associated fees.

In order to continue this relationship and the achievements realized thus far, attached as Appendix A is NG&N's proposed scope of services, fees, project deliverables and payment schedule to assist the County in the annual maintenance of the fire protection, solid waste and EMS assessment programs for Fiscal Year 2020-21. In addition to the annual maintenance services, attached as Appendix B, to this proposal also provides for updates to the roadway maintenance programs pursuant to the County's request. Please review the attached scope of services; and upon review and satisfactory determination, please sign where indicated to acknowledge acceptance of the scope of services and to serve as proper notice to proceed. Upon execution, please provide us with a signed copy for our files.

As we are currently preparing our schedule for the upcoming assessment season, we would appreciate your prompt reply which will help us to accommodate your program's schedule and ensure the continuation of this successful recurring revenue source.

Anne Brown  
April 8, 2020  
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If you have any questions, please do not hesitate to contact me. We look forward to working with Levy County again this year.

Sincerely yours,



Heather J. Encinosa

HJE:sb

Attachment

ACCEPTED AND AGREED TO  
FOR FISCAL YEAR 2020-21:

BY \_\_\_\_\_  
Levy County

\_\_\_\_\_ Date

APPROVED AS TO FORM AND LEGAL  
SUFFICIENCY Anne Bast Brown  
Anne Bast Brown, County Attorney

# Appendix A

ANNUAL FIRE PROTECTION,  
SOLID WASTE AND EMS ASSESSMENT PROGRAMS  
FISCAL YEAR 2020-21

## ***Scope of Services***

- Task 1:** Base Retainer Services for Current Fiscal Year Assessment Program. Upon notice to proceed, NG&N will be retained to administer the current fiscal year assessment program and maintain the assessment roll database. Such retainer services will include our sub-consultant's availability to respond to requests for information or assistance from County staff regarding all aspects of the current assessment program. In addition, we will prepare the critical events schedule for the upcoming fiscal year to ensure adherence to statutory deadlines and will maintain the current fiscal year database in a manner that ensures data availability to specific requests.
- Task 2:** Review and analysis of the Fiscal Year 2019-20 assessment rolls for use in the recurring annual assessment programs for Fiscal Year 2020-21 using current property appraiser data.
- Task 3:** NG&N will draft and deliver any necessary implementing resolutions that conform to the assessment ordinance(s).
- Task 4:** NG&N will advise and assist with fulfilling the legal requirements for the adoption of the annual assessment rate resolutions.
- Task 5:** Prepare final assessment roll and export/transmit rolls to the Levy County Tax Collector in their specified electronic format.

## **FEES AND COSTS**

For the professional services and specialized assistance provided by NG&N, we will work under a professional fee arrangement as described in the attached scope of services and as set forth in the following table:

<b>Program</b>	<b>Rate Consultant/ GSG Fees</b>	<b>NG&amp;N Fees</b>	<b>Total Fees</b>
Fire Protection	\$6,500	\$4,500	\$11,000
Solid Waste	\$4,875	\$2,625	\$7,500
EMS	\$6,500	\$3,500	\$10,000
<b>Total</b>	<b>\$17,875</b>	<b>\$10,625</b>	<b>\$28,500</b>

For services provided by NG&N, the fee for this scope of services is \$28,500. This fee includes expenses for airfare, lodging and ground transportation, as well as incidental expenses.

The fee for professional services includes one on-site visit by NG&N and/or GSG staff to the County. Any additional on-site meetings by NG&N or GSG staff may be arranged at our standard hourly rates provided below. All expenses related to these requested meetings will be billed in accordance with section 112.061, Florida Statutes. If necessary, in lieu of on-site visits, periodic telephone conference calls may be

scheduled to discuss project status. The standard hourly rates for NG&N and GSG are as follows:

**NABORS, GIBLIN & NICKERSON, P.A.**

Firm Partners .....	\$300
Firm Associates.....	\$275

**GOVERNMENT SERVICES GROUP, INC.**

Chief Executive Officer.....	\$235
Senior Advisor.....	\$210
Vice President/Managing Director.....	\$195
Senior Project Manager/Consultant/Project Coordinator.....	\$175
Database Analyst/Technical Services .....	\$150
Administrative Support.....	\$ 75

The lump sum fee does not include the costs of producing and mailing the statutorily required first class notices. Mailing and production costs depend on the number of assessable parcels of property within the assessment program area, but average approximately \$1.51 per parcel. Payment of mailing and production costs is due at the time of adoption of the initial assessment resolution or like document. For non-domestic notices, mailing charges will include the actual amount of postage beyond the domestic rate. Should U.S. postage rates increase prior to mailing, the additional postage per notice will be charged.

The County is responsible for any and all newspaper publications, including, but not limited to, making arrangements for publications and any costs associated therewith. The County is also responsible for any costs incurred to obtain information from the property appraiser or other public officials that is necessary for the assessment program.

**PAYMENT SCHEDULE**

The lump sum fee for professional services and specialized assistance will be due and payable, based on the following schedule and assuming that notice to proceed is received by April 30, 2020. If notice to proceed occurs after this date, the payment schedule will be adjusted based on the anticipated number of months remaining to complete the project.

<b>Payment Due</b>	<b>Percent of Total</b>	<b>Amount Due</b>
June 2020	25% of professional services fee	\$ 7,125
July 2020	25% of professional services fee	\$ 7,125
August 2020	25% of professional services fee	\$ 7,125
September 2020	25% of professional services fee	\$ 7,125
Total		\$28,500

## DELIVERABLES SCHEDULE

<b>Deliverable</b>	<b>Schedule</b>
Notice to Proceed	May 2020
Review/Update Fiscal Year 2019-20 Assessment Rolls	June–July 2020
Review/Confirm Revenue Requirements	June–July 2020
Calculate Proforma Schedule of Rates	June–July 2020
Draft and Deliver Assessment Resolutions	July–August 2020
Adopt Assessment Resolutions	August–September 2020
Certify Assessment Rolls	by September 15, 2020

# Appendix B

## UPDATING ROADWAY MAINTENANCE ASSESSMENT PROGRAM FISCAL YEAR 2020-21

## ***Scope of Services***

- Task 1:** Re-evaluate, and revise if necessary, the County's ad valorem tax roll information, agreements, reports and other data pertaining to the provision of road maintenance services.
- Task 2:** Identify the full cost of the road maintenance services delivery using the County's most current financial information and identify service delivery issues which may affect the apportionment methodology. Identify the alternative sources of revenue to fund the service delivery costs and determine the net service delivery revenue requirements. Also identify any new neighborhoods the County would like to add to the existing program.
- Task 3:** Determine the total road maintenance assessment revenue requirements to ensure the County recovers the costs of: (a) net road maintenance service delivery revenue requirements, (b) implementing the program and (c) collecting the assessments.
- Task 4:** Using the ad valorem roll and existing assessment roll, updated road maintenance revenue requirements, revise the apportionment methodology and apply to the assessment roll database to test the data validity and legal sufficiency. Revise the apportionment methodology, as necessary.
- Task 5:** Calculate proforma schedule of rates based on the apportionment methodology and revenue requirements for the Fiscal Year 2020-21 assessment program, including any new neighborhoods.
- Task 6:** Prepare and present an Assessment Memorandum which documents proposed modifications to apportionment methodology and proforma assessment rates.
- Task 7:** Draft all legal documents, including the preliminary and annual rate resolutions that conform to the assessment ordinance, to impose the updated road maintenance assessment program and implement the County's policy decisions and proposed methodology.
- Task 8:** Draft the required mailed and statutory notices for the implementation of the updated road maintenance assessment program or review and revise as needed the TRIM notice, if the County utilizes TRIM for it mailed notices.
- Task 9:** Advise and assist with the legal requirements for the adoption of the annual assessment rate resolution and certification of the assessment roll in accordance with section 197.3632, Florida Statutes including: a) the development of the first class notice or TRIM notice and its distribution to any affected property owners, if required, b) publication of the public hearing, and c) the certification of the assessment roll to the Levy County Tax Collector.



## FEES AND COSTS

For the professional services and specialized assistance described in this Scope of Services, GSG will work under a lump sum fee arrangement of \$12,500 and NGN will work under a lump sum fee arrangement of \$6,100. The total combined lump sum fee is \$18,600.

The lump sum fee for professional services includes a total of two on-site visits to the County by GSG staff and two on-site visits to the County by NGN attorneys. While the purpose of these trips is negotiable, the intent of these meetings is to (1) participate in individual briefing sessions with elected officials and staff, (2) present the updated Assessment Memorandum with revised methodology and updated modifications, and (3) assist in the updated annual assessment rate adoption process. Meetings in excess of these three meetings may be arranged at our standard hourly rates provided below. All expenses related to additional on-site meetings will be billed in accordance with section 112.061, Florida Statutes. If necessary, in lieu of on-site visits, periodic telephone conference calls may be scheduled to discuss project status.

The standard hourly rates for NGN are as follows:

### **NABORS, GIBLIN & NICKERSON, P.A.**

Firm Partners .....	\$300
Firm Associates .....	\$275

The standard hourly rates for GSG are as follows:

### **GOVERNMENT SERVICES GROUP, INC.**

Senior Advisor.....	\$285
Vice President/Managing Director .....	\$285
Director .....	\$235
Project Manager/Project Coordinator .....	\$185
Database Analyst/Technical Services .....	\$150
Lead Project Analyst .....	\$100
Project Analyst.....	\$ 90
Administrative Support.....	\$ 75

The lump sum fee does not include the costs of producing and mailing the statutorily required first class notices. Mailing and production costs depend on the number of assessable parcels of property within the assessment program area, but average approximately \$1.40 per parcel. Payment of mailing and production costs is due at the time of adoption of the initial assessment resolution or like document. For non-domestic notices, mailing charges will include the actual amount of postage beyond the domestic rate and if U.S. postage rates increase prior to mailing, the additional postage per notice will be charged.

The County is responsible for any and all newspaper publications, including, but not limited to, making arrangements for publications and any costs associated therewith.

The County is responsible for working with the Property Appraiser to obtain the necessary information for properties with exempt "home addresses" pursuant to Section 119.071, Florida Statutes.

The County is also responsible for any costs incurred to obtain information from the property appraiser or other public officials that is necessary for the assessment program.

Please note that we work with the premise of developing and implementing assessment programs with an eye on potential legal challenges in an attempt to maximize both the efficiency and the effectiveness of any defense. Nonetheless, the fees outlined above for professional services do not include any provision for litigation defense. Accordingly, in the event there is a legal challenge, we would be available, on an hourly basis, to assist the County in its defense.

## PRELIMINARY SCHEDULE

Event	Schedule
Notice to Proceed	April 2020
Identify the Full Cost of Services	April – May 2020
Determine Net Revenue Requirements	April – May 2020
Update Apportionment Methodology	May – June 2020
Proforma Assessment Rates	May – June 2020
Assessment Memorandum	June – July 2020
Assist with Preliminary Assessment Resolution	June - July 2020
Assist with TRIM or First Class Notices	July - August 2020
Assist with Published Notice	July - August 2020
Assist with Annual Assessment Resolution	August - September 2020
Assist with Certification of Fiscal Year 2020-21 Assessment Roll	by September 15, 2020

## PAYMENT SCHEDULE

The fee for professional services will be due and payable, based on the following schedule and assuming that notice to proceed is received by April 30 , 2020. If notice to proceed occurs after this date, the payment schedule will be condensed over the anticipated number of months remaining to complete the project.

Payment Due	Percent of Total	Amount Due
June 2020	25% of professional services fee	\$ 4,650
July 2020	25% of professional services fee	\$ 4,650
August 2020	25% of professional services fee	\$ 4,650
September 2020	25% of professional services fee	\$ 4,650
Total		\$18,600