

EXHIBIT A- SCOPE OF WORK

1.1. INTRODUCTION AND BACKGROUND

The City of Ocala seeks quotes from interested firms to prepare the annual fire assessment roll update for Fiscal Year 2024-25. These services will also be needed in Fiscal Year 2025-26. Consultant will provide all labor, services, etc. necessary to perform the services in strict compliance with the Scope of Work and specifications set forth herein.

The City of Ocala, located in Marion County, Florida, has a population of approximately 65,000 residents and spans 47.2 square miles. It maintains a small-town atmosphere within a medium-sized metropolitan area and is accessible via Highway 40 and Interstate 75.

The City of Ocala adopted a non-ad valorem fire assessment in January 2021. The initial year was billed directly by the City of Ocala. Years thereafter have been billed on the tax bill generated by the Marion County Tax Collector. The City plans to reimpose the non-ad valorem fire assessment for the fiscal year beginning on October 1, 2024. Annual coordination with the Marion County Property Appraiser and Marion County Tax Collector is required in accordance with the Uniform Collection Act (Florida Statutes 197.3632).

1.2. SCOPE OF WORK

The Consultant will be required to perform the following services for the City of Ocala:

- (a) Update property data portions of the fire assessment roll based on updated Marion County Property Appraiser (MCPA) database released in June/July of 2024.
- (b) Coordinate with MCPA regarding any questions on the revisions and/or new classifications.
- (c) Identify parcels that have experienced a change in their classifications.
- (d) Update the fire assessment roll and submit updated roll to the Marion County Tax Collector on or before September 15, 2024.
- (e) Incorporate any additional changes sent by MCPA in October of 2024.
- (f) Coordinate with the City's Project Manager to discuss results or respond to questions on the roll data via virtual meetings, e-mails, or phone calls.

1.3. CONTRACT TERM

Contract Term: It is anticipated that one (1) firm will be awarded the resulting professional services contract to provide the advertised services for an initial term of one (1) year, with one (1) optional one-year renewal term.

Escalation: Any price increase for contract renewal will be subject to negotiation as approved by the City of Ocala. In no case will the increase exceed three percent (3%) annually unless there are mitigating market conditions. Prices increases shall be based on the CPI-U and Consultant must submit their request for an increase with CPI justification at least 90 days prior to the end of the current term.

1.4. MINIMUM QUALIFICATIONS (Licensing, Certification and Experience). Responding teams must meet the following standards as they pertain to this Solicitation:

- (a) **Licensing Requirements.** Consultant must possess and maintain the following licensure(s) in order to be deemed qualified and responsible under this Solicitation and must identify and upload proof of said licensure via the Consultant Qualification Form attached to this Solicitation:
 - (1) Licensed in the State of Florida to perform services described in the scope of work.
- (b) **Certification Requirements.** Consultant must possess and maintain the following certification(s) in order to be deemed qualified and responsible under this Solicitation:
 - (1) Must be legally qualified and properly certified to fire assessment maintenance services proposed by this Solicitation within the State of Florida. (A copy of the firm's license to practice in the State of Florida must be included with the Proposal.)
- (c) **Experience Requirements.** Consultant must possess the following experience in order to be deemed qualified and responsible under this Solicitation and must identify and upload proof of said experience:
 - (1) Must have a minimum of (5) five years' experience in providing fire assessment roll updates or related services for governmental agencies within the State of Florida.
 - (2) Consultants must provide at least (3) three references of similar work as described in this scope of work with other agencies. Consultants must provide a brief description of each contract to include the type of service provided, contract beginning/end dates, contact name, address, phone number and e-mail address.

1.5. INSURANCE REQUIREMENTS

- (a) **Commercial Auto Liability.** Awarded Consultant shall procure and maintain for the life of this agreement commercial auto liability insurance with a minimum combined single limit of One Million Dollars (\$1,000,000) per occurrence for bodily injury and property damage arising out of Consultant's operations and covering all owned, hired, scheduled, and non-owned automobiles utilized in said operations.
- (b) **Commercial General Liability.** Awarded Consultant shall procure and maintain for the life of this agreement commercial liability insurance with minimum coverage limits not less than:
 - (1) One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate (or project aggregate, if a construction project) for bodily injury, property damage, and personal and advertising injury; and
 - (2) One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate (or project aggregate, if a construction project) for products and completed operations.
 - (3) Policy must include coverage for contractual liability and independent Consultants.
- (c) **Workers' Compensation and Employer's Liability.** Awarded Consultant shall procure and maintain for the life of this agreement adequate workers' compensation and employer's liability insurance covering all of its employees in at least such amounts as required by Chapter 440, Florida Statutes, and all other state and federal workers' compensation laws. Consultant shall ensure any and all sub-Contractors have the required coverage for all of their employees as required by applicable law. Consultant shall waive, and shall ensure that its insurance carrier waives, all subrogation rights against the City of Ocala and its officers, employees, and volunteers for all losses or damages.

(d) **Special Insurance Requirements:**

(1) **Professional Liability/Errors and Omissions Insurance.** Awarded Consultant shall procure and maintain, for a period of at least **Five (5) Years** from the date of acceptance of the work by the City, a policy of professional liability/error and omissions insurance in an amount not less than \$1,000,000 per claim.

(e) **City as Additional Insured and Endorsements.** The City of Ocala shall be named as an Additional Insured and Certificate Holder on all liability policies identified in this section with the exception of Workers' Compensation and Professional Liability policies. Consultant's Worker's Compensation policy shall be endorsed with WC 00 03 13 Waiver of our Right to Recover from Others or its equivalent. Consultant's Commercial General Liability policy shall be endorsed with a CG 20 26 04 13 Additional Insured – Designated Person or Organization Endorsement or similar endorsement providing equal or broader Additional Insured Coverage with respect to liabilities arising out of activities performed by or on behalf of Consultant.

(f) **Failure to Maintain Required Coverage.** In the event that Consultant fails to obtain or maintain in full force and effect any required insurance coverage, the City may procure same from insurance carriers as the City may deem proper, irrespective that a lesser premium for such insurance coverage may be available, and Consultant shall pay, upon demand by City, any and all premiums, costs, charges and expenses incurred or expended by City in obtaining such insurance. Notwithstanding the foregoing, in the event City is forced to procure the required insurance coverage due to Consultant's failure to comply with these Insurance Requirements, City shall in no manner be liable to Consultant for any insufficiency or failure of coverage with regard to same or any loss to Consultant occasioned thereby. Additionally, the procurement of such insurance coverage shall not relieve Consultant of its obligation to maintain said coverage in the types and amounts specified herein and Consultant shall nevertheless hold City harmless from any loss or damage incurred or suffered by City from Consultant's failure to maintain said coverage.

(g) **Other Miscellaneous Insurance Provisions.**

(1) These insurance requirements shall not relieve or limit the liability of Consultant. City does not in any way represent that these types or amounts of insurance are sufficient or adequate to protect Consultant's interests or liabilities but are merely minimums. No insurance is provided by the City under any contract to cover Consultant.

(2) No work shall be commenced under any contract until the required Certificate(s) of Insurance have been provided. Work shall not continue after expiration (or cancellation) of the Certificates of Insurance and shall not resume until new Certificate(s) of Insurance have been provided. Insurance written on a "Claims Made" form is not acceptable without consultation with City of Ocala Risk Management.

(a) Consultant shall arrange for its liability insurance to include, or be endorsed to include, a severability of interests/cross-liability provision so that the "City of Ocala" (where named as an additional insured) will be treated as if a separate policy were in existence, but without increasing the policy limits.

1.6. **EXHIBITS.** The following Exhibits are incorporated into and made a part of this Solicitation as if fully set forth herein:

City of Ocala Fire Assessment Study (June 2023)

1.7. **CITY'S RESPONSIBILITIES**

- (a) City will provide contract administration services during the life of the Project. Consultant must provide for its own quality assurance and quality control inspections, testing and material certifications and not rely upon the City for these services.
- (b) In addition to the foregoing, the City shall:
 - (1) make staff available for sufficient hours as is required to meet with Consultant and provide such information as required;
 - (2) assign a Project Manager who will oversee the work and provide support as needed;

1.8. CONSULTANT RESPONSIBILITIES

- (c) Consultant shall complete all work required under this Scope of Work in conformance with the policies and procedures of the City of Ocala and all applicable state, federal and local laws, policies, procedures, codes, regulations, and guidelines.
- (d) An employee roster must be provided for all projects assigned.
- (e) Consultant must utilize competent employees in performing the work. Employees performing the work must be properly licensed or qualified as required by the scope/project.
- (f) The Consultant shall ensure that all documents prepared under this contract have been prepared on a Windows-based operating system computer using the most current version of Microsoft Office, which includes: Word, Excel, Power Point, Access or any other software as specified and approved by City staff.
- (g) Data collected by the Consultant shall be in a format compatible with, or easily converted to City's databases.

1.9. INVOICING

- (a) **Invoice Submission:** All original invoices shall be sent to the City's Project Manager for the requesting department, Tammi Haslam, Budget Director, thaslam@ocalafl.gov
- (b) **Timely Payment for Services:** Payments shall be made no later than the time periods established by Section 218.735, Florida Statutes.
- (c) **Frequency of Invoices:** Consultant shall invoice at last once per month.

1.10. PRICING AND AWARD

Consultant must submit a lump sum cost to provide annual fire assessment roll update services for the first initial contract and the optional one, year renewal. Lump sum amount must include all direct and indirect costs to complete the project. Award will be made to the lowest, responsive bidder meeting all requirements outlined herein.