

BACKGROUND

The City of Ocala is soliciting quotes from qualified firms to complete the annual update of the fire assessment roll for Fiscal Year 2026–2027. These services will also be required for Fiscal Year 2027–2028. The selected consultant will be responsible for providing all labor, services, and related resources necessary to perform the work in full compliance with the Scope of Work and specifications outlined in this solicitation.

The City of Ocala, located in Marion County, Florida, has an estimated population of 65,000 residents and covers approximately 47.2 square miles. The City offers a small-town environment within a growing metropolitan area and is conveniently accessible via Highway 40 and Interstate 75.

In January 2021, the City adopted a non-ad valorem fire assessment. The first year of the assessment was billed directly by the City of Ocala, with subsequent years included in tax bills issued by the Marion County Tax Collector. The City anticipates reimposing the non-ad valorem fire assessment for the fiscal year beginning October 1, 2024. Annual coordination with the Marion County Property Appraiser and the Marion County Tax Collector is required pursuant to the Uniform Collection Act (Florida Statutes 197.3632).

LICENSING AND EXPERIENCE REQUIREMENTS

1. **Licensing Requirement:** Bidder must be licensed and legally qualified, properly certified to perform fire assessment maintenance services proposed by this Solicitation within the State of Florida.
2. **Experience Requirement:** Bidder must possess five (5) years' experience in providing fire assessment roll updates within the State of Florida. Bidder must provide at least three (3) references of similar work as described in this scope of work with other agencies in the State of Florida. Bidder 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.

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, and 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-Consultants have the required coverage for all of their employees as required by applicable law. Consultants 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. RFQ# BUD/240482 3 Annual Fire Assessment Roll Update
- 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.**
- a. 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.
 - b. No work shall be commenced under any contract until the required Certificate(s) of Insurance has been provided. Work shall not continue after expiration (or cancellation) of the Certificates of Insurance and shall not be resumed 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.
1. 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.

CONTRACT TERM/DELIVERY TIMELINE

1. **Term:** The resulting contract will be for an initial term of one (1) year.
2. **Renewals:** One (1) optional, one-year renewal term.

3. **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.

PROJECT SUMMARY AND DELIVERABLES

1. **Project Summary:** The Consultant will be required to perform the following services for the City of Ocala:
 - Update property data portions of the fire assessment roll based on the updated Marion County Property Appraiser (MCPA) database released in June/July of 2026.
 - Coordinate with MCPA regarding any questions on the revisions and/or new classifications.
 - Identify parcels that have experienced a change in their classifications.
 - Update the fire assessment roll and submit the updated roll to the Marion County Tax Collector on or before September 15, 2026.
 - Incorporate any additional changes sent by MCPA in October of 2026.
 - 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.
2. **Important Dates:**

TRIM Data

 - Friday, July 31st, 5:00 P.M: TRIM Notice Non-Ad Valorem Data Cut-off.
 - Saturday, August 1st, by Noon: MCPA provides TRIM data to the City of Ocala or its designee.
 - Tuesday, August 4th, by Noon: City of Ocala returns TRIM data to MCPA.

TRIM Notices

 - Thursday, August 20th: Tentative mailing date.

Final Roll (Tax Notices)

 - Friday, October 2nd, 5:00 P.M.: Final Roll Cut-off.
 - Saturday, October 3rd, by Noon: MCPA provides final roll data to the City of Ocala or its designee.
 - Tuesday, October 6th, by Noon: City of Ocala returns final roll data to MCPA
3. **Deliverables:** The Consultant shall provide monthly reports of all work in progress. Deliverables must be provided to the City of Ocala Project Manager before payment for such work.

CONSULTANT EMPLOYEES AND EQUIPMENT

1. 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.
2. The Consultant shall provide an assigned Project Manager, who will be the primary point of contact. Consultant must provide a valid telephone number and address at all times to the City Project Manager. The telephone must be answered during normal working hours or voicemail must be available to take a message.
3. At the request of the City, the Consultant must replace any incompetent, unfaithful, abusive, or disorderly person in their employment. The City and the Consultant must each be promptly notified by the other of any complaints received.
4. The Consultant will operate as an independent consultant and not as an agent, representative, partner

or employee of the City of Ocala, and shall control their operations at the work site, and be solely responsible for the acts or omissions of their employees.

CITY OF OCALA RESPONSIBILITIES

1. The City of Ocala will furnish the following services/data to the Consultant for the performance of services:
 - A. Access to City buildings and facilities to perform the work.
 - B. Provide access to drawings, specifications, schedules, reports, and other information prepared by/for the City of Ocala pertinent to the Consultant's responsibilities.
 - C. Provide office facilities for the Consultant, if needed.

CONSULTANT RESPONSIBILITIES

1. The Consultant shall complete all work performed under this solicitation in accordance with policies and procedures of the City of Ocala and all applicable State and Federal laws, policies, procedures, and guidelines.
2. The Consultant shall obtain and pay for any licenses, additional equipment, etc., required to fulfill this contract.
3. Data collected by the Consultant shall be in a format compatible with or easily converted to City's databases. A sequential naming convention should be applied to the files and documentation provided to the City.
4. 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.

SUB-CONTRACTORS

1. Consultant must perform a minimum of **100%** of the work with their own forces.

SAFETY

1. The Consultant shall be fully responsible for the provision of adequate and proper safety precautions meeting all OSHA, local, state, and national codes concerning safety provisions for their employees, sub-consultants, all building and site occupants, staff, public, and all persons in or around the work area.
2. In no event shall the City be responsible for any damage to any of the Consultant's equipment, materials, property, or clothing lost, damaged, destroyed or stolen.

INVOICING

1. All original invoices will be sent to: Tammi Haslam, Project Manager, Budget Department, 110 SE Watula Avenue, 3rd Floor, Ocala, FL 34471, email: thaslam@ocalafl.gov
2. Consultant will invoice at least once a month.
3. Consultant will be given a coversheet for their invoice. This coversheet must be filled out correctly and submitted with each invoice.
4. Payments shall be made no later than the time periods established by Section 218.735, Florida Statutes.

PRICING AND AWARD

1. Bidder must upload a completed Price Proposal with their response.
2. Bids will be received on a lump sum basis. Lump sum amount must include all direct and indirect costs

to complete the project.

3. Award will be made to the lowest bidder meeting all requirements outlined herein.