



**FIRE ASSESSMENT FEE STUDY
EVENT NO. 4938**

**SECTION II
SCOPE OF WORK**

- 2.0 Broad Description of Project:** The City of Savannah is soliciting proposals from qualified consulting firms to develop and implement a non-ad valorem fire services assessment program. The project is divided into two (2) phases. Phase I includes all tasks associated with the development of preliminary proforma assessment rates. The City will make an informed decision regarding whether to proceed with implementing the assessment program at the end of Phase I.

Phase II shall include the specific work effort required for the implementation of the program based on the City's policy direction as determined from the findings provided in Phase I.

All respondents to this RFP are subject to instructions communicated in this document and are cautioned to completely review the entire RFP and follow instructions carefully. The City reserves the right to reject any or all proposals, and/or to waive technicalities and informalities at the sole discretion of the City.

Electronic submissions will not be accepted for this proposal.

2.1 Scope of Services

The successful proposer shall provide the following services in a phased approach to include the following tasks:

Phase I

1. **Evaluate Data Pertaining to Fire Services:** Evaluate existing City documents, ad valorem tax roll information, fire call data, agreements, reports, levels of service, five (5) year budget allocations, projected long-term capital needs, and other data pertaining to the provision of fire services. See Attachment B for a list of documents/data that will be provided by City Staff upon issuance of a Notice to Proceed to the selected consultant.
2. **Review and Evaluate Outstanding Issues:** Research, identify, and evaluate outstanding funding issues that need to be addressed during the development of the fire services funding options and apportionment methodology and assist the City in identifying policy decisions necessary to implement a City assessment program in 2018.
3. **Determine Full Costs of Service:** Evaluate the full cost of fire service delivery using the City's most current financial information including direct and indirect costs.

4. **Analyze Call Data and Correlate with Property Data:** Evaluate a minimum of three (3) years of the City's fire incident reports and correlate the fixed property uses on the reports to comparable property uses on the tax roll. Analyze all property use categories within the City to determine which parcels receive a special benefit from the provision of fire services.
5. **Develop Apportionment Methodology:** Develop a fair and reasonable method of apportionment and accurate classification of parcels using the current ad valorem tax roll and fire incident data reports. Review the assessment methodology for legal sufficiency and compatibility with the recommended fee collection method. Create a preliminary assessment roll database using the current tax roll and apply the apportionment methodology to the database to test validity and legal sufficiency. The consultant shall evaluate the City's current systems, staffing, and other pertinent data to determine and recommend the best and most cost efficient method of collecting the fee.
6. **Identify Service Delivery Issues:** Identify and analyze any potential service delivery issues that may affect the apportionment methodology.
7. **Determine Assessment Rates:** Calculate a proforma schedule of rates based on the developed apportionment methodology and revenue requirements for the assessment program using the developed assessment roll.
8. **Identify Revenue Requirements and Alternative Revenue Sources:** Advise the City in determining the total fire department service assessment revenue requirements to ensure recovery of net fire service delivery costs, implementing the program, and collecting the assessment. Identify alternative sources of revenue to fund the service delivery costs.
9. **Review Legal Sufficiency of Assessment Methodology:** Review the assessment methodology for legal sufficiency and compatibility with the recommended method of collection. Ensure that the data approach used is the appropriate databases to support the recommended collection method in recurring years.
10. **Present Results to City:** Prepare a draft assessment report that identifies the apportionment methodology, benefited properties, proforma assessment rates, and alternatives for funding fire services. The report shall also include a cost-benefit analysis, revenue generation options, and the steps and timetable for implementing the fire assessment within the City of Savannah jurisdiction. Present the draft report to City staff for input, revise as necessary, produce a final report, and present the report to the Mayor and Aldermen of the City of Savannah.

Phase II

1. **Assist with Ordinance Development:** Advise and assist with ensuring legal requirements for the calculation, development, and adoption of the final assessment rate ordinance and certification of the tax roll are in accordance with Georgia Statutes.
2. **Assist with Implementing Assessment Resolution:** Advise and assist the City's legal counsel in drafting/implementing assessment resolution that conforms to the assessment

ordinance and implementation of the City's policy decisions and proposed methodology.

3. **Create Final Assessment Roll:** After verification of the final rates for the assessment program, update the assessment roll with any corrections and updates received from the City. The final roll will be provided to the City.
4. **Provide City with Source Files:** Provide all source files to the City in Microsoft Word and Excel file format.
5. **Additional Services:** The successful consultant may be required to provide additional services to the City regarding public education workshops, informational brochures, challenges, public protests, administrative hearings, or similar matters. At a separate hourly fee, the consultant shall be available to represent the City, serve as an expert witness, and provide supporting documentation as necessary

2.2 Proposal Format

Proposals shall be submitted in the following format and include the following information:

- a) **Cover letter** stating the intent of the proposer for this event. Cover letter must include acknowledgement of all addenda issued for this proposal. If addenda are not acknowledged in the cover letter, proposals will not be considered further.
- b) **Understanding and Methodology:** Detailed description in narrative format describing understanding of the project and methodology to accomplish each task in Scope of Services, Section 2.1.
- c) **Fee Proposals** per instructions in Section III signed by responsible party and submitted in a separate, sealed envelope. Identify additional services which may be required and associated costs.
- d) **Statement of Qualifications:** Response to Consultant Statement of Qualifications (Attachment A) included with this document. Attach resumes of all key team members.
- e) **Business information:** History and background of the firm, the firm's expertise, and number of years in business.
- f) **Description and References on Similar Projects:** State whether the firm has prior experience relative to the proposed project. Provide a minimum of three (3) successfully completed reference projects, similar in nature to the above requested proposal. Reference projects should include project name, location, description of work, date completed, and representative's name, address, phone number, and other contact information.
- g) **Schedule of Minority/Women Business Participation and Non-Discrimination Statement.**
- h) **Schedule of proposed timeline for project.**

A table of contents with corresponding tabs should be included to identify each section.

2.3 Basis of Award

Proposals will be evaluated according to the following criteria and weight:

- a) Proposer's qualifications and experience, including support capabilities (30 points)
- b) Methodology (20 points)
- c) Proposed schedule (15 points)
- d) References (5 points)
- e) Fees (15 points)
- f) MWBE participation goals (10 points)
- g) Local vendor (Within the city limits of Savannah and has a City of Savannah Business Tax Certificate) participation (5 points)

Proposals shall be evaluated by a selection committee. The selection committee may, at its option, request interviews with any and all proposers to gather additional information to be used in the evaluation process. At the discretion of the selection committee, these interviews may or may not be held on the premises of the City of Savannah. Any costs such as travel or preparation associated with the interview process will be borne solely by the proposers. Only the fee proposals of those deemed qualified will be opened. The City also reserves the right to request a best and final offer (BFO) and to rescore evaluations based on the best and final offer. Proposers may be required to provide clarification of their proposal as part of the BFO response.

Proposals must have scored a minimum of 56 out of the 70 available points allocated for proposer's qualifications and experience, methodology, schedule, and references to be deemed qualified to have their fees opened and considered.

2.4 Copies

One (1) unbound, printed and signed original, six (6) identical, printed copies, and one (1) electronic copy on a flash drive of the proposal and supporting documents must be submitted in response to the RFP. All responses must relate to the specifications as outlined.

2.5 Contacts

Proposers must submit proposals in accordance with the instructions contained in this RFP. All requested information must be submitted with the proposal. Instructions for preparation and submission of proposals are contained in this package. All questions regarding this request for proposal should be submitted in writing and emailed to the person listed on the summary event page

2.6 Minority/Woman Business Enterprise Goals

The City of Savannah has established a 6 % M/WBE goal for this project. The breakdown is as follows: 3% MBE, 3% Women Participation.

2.7 Local Vendor Definition

A bidder or business shall be considered a local vendor if it meets all of the following requirements:

- a) The bidder or business must operate and maintain a regular place of business with a physical address within the corporate limits of the city, and
- b) The bidder or business must at the time of bid or quotation submission, have a current city business tax certificate issued by the city, and
- c) The business owner must serve a commercially useful function, meaning performance of real and actual service in the discharge of any contractual endeavor. The contractor/vendor must perform a distinct element of work for which the business owner has the skills, qualifications and expertise, as well as the responsibility for the actual performance, management and supervision of the work for which he/she has been contracted to perform.

2.8 Qualifications

Proposer shall have experience and training in providing special assessment services to local governments. In addition, the proposer shall meet the following minimum qualifications:

- Five (5) years of related work experience and training in providing special assessment services for government entities.
- Knowledge of state laws governing special non-ad valorem assessments.

2.9 Schedule

Each proposer shall provide a schedule detailing how the proposer will provide the services described in this RFP. It should be noted that it is the City's goal to complete both phases of the project within the first half of 2017.

2.10 Fees: The proposer shall submit fees based on the detailed listing in Section III of the RFP. The proposer shall provide hourly fees for services not specifically shown in the scope of services.

2.11 Insurance Requirements

2.11.1 Comprehensive General Liability

Contractor shall carry comprehensive general liability on an occurrence form with no "x, c or u" exclusions with the following minimum limits:

- Each occurrence - \$2,000,000
- Damage to Rented Premises - \$1,000,000
- Medical Expense - \$5,000
- Personal & Adv Injury - \$1,000,000
- General Aggregate - \$2,000,000
- Products – Completed Ops. Aggregate - \$2,000,000

General aggregate shall apply on a per project basis

Contractor will provide a Certificate of Insurance reflecting required coverage.

A waiver of subrogation endorsement to the policy in favor of the City shall also be provided and attached to the certificate

A (30) day notice of cancellation in favor of the City must be endorsed to policy and attached to the certificate

2.11.2 Professional Liability

\$ 1,000,000 per occurrence limit

2.11.3 Commercial Automobile Liability

The automobile policy must include coverage for owned, non-owned and hired automobiles

- Minimum limits are \$1,000,000
- Contractor will provide a Certificate of Insurance reflecting required coverage.
- A waiver of subrogation endorsement to the policy in favor of the City shall also be provided and attached to the certificate
- A (30) day notice of cancellation in favor of the City must be endorsed to policy and attached to the certificate

2.11.4 Workers Compensation

Contractor shall carry a workers compensation policy including all statutory coverage required by Georgia state law

Minimum employer's liability limits:

- \$500,000 each accident
- \$500,000 each employee (disease)
- \$500,000 policy limit (disease)

Contractor will provide a Certificate of Insurance reflecting required coverage.

A waiver of subrogation endorsement to the policy in favor of the City shall also be provided and attached to the certificate

A (30) day notice of cancellation in favor of the City must be endorsed to policy and attached to the certificate

2.11.5 Umbrella/Excess Liability

Contractor shall carry an umbrella/excess liability policy which must follow form over underlying policies: general liability, auto liability and employer's liability.

Minimum limits:

- \$2,000,000 per occurrence
- \$2,000,000 aggregate

Contractor will provide a Certificate of Insurance reflecting required coverage.

Waiver of subrogation endorsement to the policy in favor of the City shall also be provided and attached to the certificate

A (30) day notice of cancellation in favor of the City must be endorsed to policy and attached to the certificate

2.11.6 General

All insurance shall be placed with Georgia admitted carriers with a current Best's rating of A (minus), X, or better

Any modifications to specifications must be approved by the City

2.12 Acknowledgement of Addenda: The proposer is responsible for determining and acknowledging any addenda issued in connection with this RFP. Addenda must be acknowledged in order for proposals to be considered.

SECTION III
FEE PROPOSAL

Fee proposals shall be submitted on this form in a separate sealed envelope clearly marked Fee Proposal for Fire Assessment Fee Study, RFP Event No. 4938 and include the name of the proposer. Fee proposals will only be opened if, after the initial evaluation, proposer is deemed to be qualified per Section 2.3. Fee proposals will then be considered in relation to the qualification points awarded to determine the overall best proposal in terms of fees and qualifications.

ALL PROPOSERS MUST BE REGISTERED SUPPLIERS ON THE CITY'S WEBSITE TO BE AWARDED AN EVENT. PLEASE REGISTER AT WWW.SAVANNAHGA.GOV. ELECTRONIC SUBMISSIONS WILL NOT BE ACCEPTED. PROPOSALS MUST BE SUBMITTED ON THIS FORM.

Total Cost for Phase I Tasks \$ _____

Total Cost for Phase II Tasks \$ _____

SUBMITTED BY: _____

PROPOSER: _____

SIGNED: _____

NAME (PRINT): _____

ADDRESS: _____

CITY/STATE: _____ ZIP _____

TELEPHONE: (_____) _____
Area Code

FAX: (_____) _____
Area Code

CONFIRM RECEIPT OF ANY ADDENDA ISSUED FOR THIS BID:

ADDENDUM _____ #
DATE _____

DO YOU HAVE THE REQUIRED INSURANCE? _____

I certify this bid complies with the General and Specific Specifications and Conditions issued by the City except as clearly marked in the attached copy.

Please Print Name

Authorization Signature

Date

INDICATE MINORITY OWNERSHIP STATUS OF BIDDER (FOR STATISTICAL PURPOSES ONLY):

CHECK ONE:

_____ NON-MINORITY OWNED
_____ AFRICAN AMERICAN
_____ HISPANIC
_____ WOMAN (non-minority)

_____ ASIAN AMERICAN
_____ AMERICAN INDIAN
_____ OTHER MINORITY Describe _____

NON-DISCRIMINATION STATEMENT

The bidder certifies that:

- (1) No person shall be excluded from participation in, denied the benefit of, or otherwise discriminated against on the basis of race, color, national origin, or gender in connection with any bid submitted to the City of Savannah or the performance of any contract resulting therefrom;
- (2) That it is and shall be the policy of this company to provide equal opportunity to all business persons seeking to contract or otherwise interested in contracting with this company, including those companies owned and controlled by racial minorities, cultural minorities, and women;
- (3) In connection herewith, we acknowledge and warrant that this company has been made aware of, understands and agrees to take affirmative action to provide such companies with the maximum practicable opportunities to do business with this company;
- (4) That this promise of non-discrimination as made and set forth herein shall be continuing in nature and shall remain in full force and effect without interruption;
- (5) That the promises of non-discrimination as made and set forth herein shall be and are hereby deemed to be made as part of and incorporated by reference into any contract or portion thereof which this company may hereafter obtain and;
- (6) That the failure of this company to satisfactorily discharge any of the promises of non-discrimination as made and set forth herein shall constitute a material breach of contract entitling the City of Savannah to declare the contract in default and to exercise any and all applicable rights and remedies including but not limited to cancellation of the contract, termination of the contract, suspension and debarment from future contracting opportunities, and withholding and/or forfeiture of compensation due and owing on a contract.

Signature

Title

PROPOSED SCHEDULE OF M/WBE PARTICIPATION

All M/WBEs listed **must be certified as a minority-owned or women-owned business** by the City of Savannah or a federally-recognized or state-level certifying agency (such as USDOT, State DOT, SBA 8(a) or GMSDC) that utilizes certification standards comparable to the City of Savannah **prior** to the due date of this bid. **Other business certifications that do not specify majority woman or minority ownership may not be substituted. Proof of M/WBE certification from the certifying agency is required to accompany the bid.** A firm that has submitted an application for M/WBE certification but has not been certified is not qualified as a certified M/WBE and will not be recognized as such during the City’s evaluation process. To expedite verification, please provide accurate phone numbers for all M/WBEs listed and ensure firms understand contact will be made following bid submittal.

Name of Proposer: _____ Event No. _____

Project Title: _____

NOTE: Unless certified through the City of Savannah M/WBE Program, proof of M/WBE certification must be attached for all firms listed.

Name of M/WBE Participant	Name of Majority Owner	Telephone	Address (City, State)	Type of Work Sub-Contracted	Estimated Sub-contract Value	MBE or WBE	Certified ? (Y or N)	Certifying Agency? (City of Sav. or Other)
					%			
					%			
					%			
					%			
					%			
					%			

MBE Participation Value: _____ % WBE Participation Value: _____ % M/WBE Participation Value: _____ %

The undersigned will enter into a formal agreement with the M/WBE Subcontractors/Proposers identified herein for work listed in this schedule, conditioned upon executing a contract with the Mayor and Aldermen of the City of Savannah. The Prime’s subcontractor that subcontracts work must enter into a formal agreement with the tier subcontractor identified herein for work listed in this schedule. The Prime may count toward the goal any tier of M/WBE subcontractors and/or suppliers that will be utilized in the contract work. However, when an M/WBE subcontracts part of the work, the value of the subcontracted work may **only** be counted toward the goal **if the tier subcontractor is an M/WBE**. Any work an M/WBE firm subcontracts to a non-M/WBE firm **will not count toward the M/WBE goal**. It is the responsibility of the Prime contractor to advise all M/WBEs of this requirement and to ensure compliance by subcontractors.

Joint Venture Disclosure

If the prime bidder is a joint venture, please describe the nature of the joint venture, the level of work and the financial participation to be provided by the Minority/Female joint venture firm in the space provided below.

Joint Venture Firms	Level of Work	Financial Participation

Printed name (company officer or representative): _____

Signature: _____ Date: _____

Title: _____ Email: _____

Telephone: _____ Fax: _____

The Minority/Women Owned Business Office is available to assist with identifying certified M/WBEs. Please contact the M/WBE Office at (912) 652-3582. The City of Savannah’s certified M/WBE registry is posted on its website @ www.savannahga.gov.

Developing a Strong M/WBE Participation Plan

Key facts every bidder/proposer needs to know prior to developing their M/WBE Participation Plan:

1. All bidders/proposers must submit a "Proposed Schedule of M/WBE Participation" which identifies the minority and/or woman-owned companies that have agreed to participate in the project if awarded. All companies listed on the form must be certified as either minority-owned and controlled or woman-owned and controlled. The City does not accept a company's "self-identification" as minority or woman-owned.
2. **Proof** of M/WBE certification from the certifying agency is required to accompany the bid; and certification must have been completed by the City of Savannah, a federally-recognized or a state-level certifying agency (USDOT, State DOT, SBA 8(a) or GMSDC) utilizing certification standards comparable to the City of Savannah.
3. The certification must have been approved prior to the due date of this bid. A firm that has submitted an application for certification but has not been certified will not be counted toward the M/WBE goal.
4. The M/WBE Office **will be contacting all M/WBE firms** included in the bidder's M/WBE Plan to confirm each: a) was contacted by the bidder/proposer; b) performs the type of work listed; and c) agreed to participate.
5. To expedite the verification process, bidders/proposers need to: provide accurate phone numbers for all M/WBEs listed; ensure M/WBEs know to expect to be contacted by phone and email; request M/WBEs be accessible during the critical period before bid-opening; and advise M/WBEs that City staff **must** receive the M/WBE's confirmation that the firm agreed to participate in the bid/proposal in order for the prime contractor to receive credit toward their proposed M/WBE participation goals.
6. If a proposed M/WBE cannot be confirmed as certified, performing the type of work described or agreeing to participate, the bidder/proposer will be notified and given a pre-determined period to submit a correction. If an M/WBE still cannot be confirmed or replaced, the proposed percentage of participation associated with the unverified M/WBE firm will **not be counted** and **will be deducted** from the overall proposed M/WBE goal.
7. Any tier of M/WBE subcontractors or suppliers that will be utilized in the contract work may count toward the MBE and WBE goal **as long as the tier subcontractors/suppliers are certified M/WBEs**. Work that an M/WBE subcontracts to a non-M/WBE firm does **not** count toward the M/WBE goal.
8. M/WBEs must perform a "**commercially useful function**" which is the provision of real and actual work or products, or performing a distinct element of work for which the business has the skills, qualifications and expertise, and the responsibility for the actual management and supervision of the work contracted.
9. Per the *Proposed Schedule of M/WBE Participation* "the undersigned (bidder/proposer) will enter into a formal agreement with the M/WBE Subcontractors/Proposers identified herein for work listed in this schedule, conditioned upon executing a contract with the Mayor and Aldermen of the City of Savannah." **This signed commitment is taken seriously by the City**, so do not list M/WBEs you do not plan to utilize. Any proposed changes must be pre-approved by the M/WBE Office, be based on legitimate business-related reasons, and still meet the M/WBE participation goals per the City's contract.
10. A bidder who is a certified M/WBE may count toward the goal the portion of work or services on a City contract that is actually performed by the M/WBE, including: the cost of supplies/materials purchased or equipment leased for contract work, fees for bona fide services such as professional or technical services, or for providing bonds or insurance specifically required for the performance of a City contract.
11. If awarded the contract, the MWBE Office **will be reviewing your company's subcontracts, invoices and payment records** to substantiate the completion of work and payment of M/WBEs. If the prime contractor is an M/WBE that is being included in its M/WBE goal, the prime contractor must maintain records **that will be inspected** to prove the portion of work performed, cost of work, and payments to the prime company.
12. Most bids for goods and materials do not have specific MWBE goals established for the contract. If no goals are include in the scope of work or General Specifications, you are not required to submit MWBE participation but encouraged to do so when the opportunity is available. The City maintains this information for statistical purposes only and it is not reflected in the award decision.

Attachment B

The following is a list of documents and/or data that will be provided to the selected consultant following the issuance of a Notice to Proceed:

1. Savannah Fire & Emergency Services (SFES) Organizational Chart
2. SFES Apparatus Normal Staffing Requirements
3. SFES Apparatus Fire Flow
4. Service Delivery Description
5. Minimum Response Protocol
6. Fire Incident/call data (Three years)
7. Risk analysis data found in the Standards of Cover (conducted annually)
8. Tax Roll data
9. Current Adopted Budget and Five-Year Capital Improvement Program
10. Other data related to this study