



October 8, 2018

Ms. Juliana B. Bellia
Director
Department of Public Works
City of North Port
1100 N. Chamberlain Blvd.
North Port, FL 34286

Re: Proposal – FY 2019 Update of the Road and Drainage Assessment Program

Dear Ms. Bellia:

As requested by Valerie Malingowski, I am delighted to present this Proposal to perform an FY 2019 Update of the Road and Drainage Assessment Program. This document includes the proposed scope, fee and schedule to complete the project.

Scope

Based upon the scope of services requested by Valerie, I have prepared a Project Scope and Fee Estimate Schedule (Schedule) for the project, which is enclosed and presents a detailed work plan to accomplish the objectives of the study. The scope includes the following as separate work elements as requested;

Work Element 1 – Update the Ten Year Revenue Sufficiency Analysis (Removed from Scope per District Staff Request),

Work Element 2 – Update the Assessment Methodology, Rates and Assessment Roll

Work Element 3 – Accomplish First Class Mailing of Notices of Hearing and Implementation

During the project, we will conduct several interactive work sessions with City staff and we will present the results to the City Manager and to the City Commission and prepare a Final Report of the results of the Study. As requested, we have included three (3) whole day workshops with the City Commission. Implementation assistance tasks are shown in the above referenced Schedule for Work Element 3, and are included in the proposed fee, including an estimated pass through expense for a mail contractor to assist with the First Class mailing of Notices of Hearing, which includes mail contractor costs and postage.



Fee

This enclosed Schedule presents our proposed work plan to accomplish the scope of services, the estimated time for each task by consultant and the fee to complete the Study and a Fee Summary is presented below. It is our practice to invoice monthly for the percentage work completed by task.

Work Element		Hours	Fee
Work Element 1	Update Revenue Sufficiency Analysis (Removed per District Staff Request)	0	\$ -
Work Element 2	Update Assessment Methodology, Rates and Assessment Roll	283	\$ 55,539
Work Element 3	First Class Mailing of Notices of Hearing and Implementation	103	\$ 19,695
Total Project, Exclusive of First Class Mailing of Notices of Hearing		386	\$ 75,234
Estimated Pass Through Expense of Mail Contractor			\$ 47,190
Total Project, Inclusive of First Class Mailing of Notices of Hearing			\$ 122,424

Schedule

We can begin the project immediately upon receipt of a notice-to-proceed and we anticipate that this Study can be completed in approximately 90 - 120 days. However, based upon the statutory requirement that the City conduct a public hearing to adopt any changes to methodology or increases to the Road & Drainage Assessments by September 15, 2019 we propose a contract period from the date approval of this Proposal through September 30, 2019 to allow time for Council workshops, mailing of notices of hearing prior to the above referenced hearing, and certification of the Assessment Roll to the Tax Collector.

Conclusion

We appreciate the opportunity to present this proposal and look forward to continuing to be of service to the City on this important project. If you have any questions, or would like to discuss this proposal, do not hesitate to call me at (904) 923-1466.

Very truly yours,



Michael E. Burton
Vice President, Financial Services

Enclosures





City of North Port - Road and Drainage District
 FY 2019 UPDATE OF ROAD AND DRAINAGE ASSESSMENT PROGRAM
PROJECT WORK PLAN & FEE ESTIMATE SCHEDULE



PROJECT TASKS		ESTIMATED MAN-HOURS				Total
		Project Principal	Project Manager	Project Consultant	Project Analyst	
		\$329	\$271	\$177	\$132	
<i>Hourly rate--></i>						
Work Element 1 <u>Update Assessment Methodology, Rates and Assessment Roll</u>						
Task 1: Develop Road and Drainage Assessment Model						
1.1	Confirm definition of road and drainage benefit criteria (roads: trip generation rates - drainage: impervious surface based alternative and primary, secondary & tertiary benefits alternative) and determine benefit basis that is most appropriate for the City's Road and Drainage District.	0	0	1	0	1
1.2	Confirm cost apportionment methodology based upon selected assessment methodology from the prior sub-task.	0	0	1	0	1
1.3	Conduct a conference call with District staff to discuss assessment methodology alternatives and to confirm the preferred methodology to be used in developing the assessments.	1	1	1	1	4
1.4	Meet with District staff to update identification and allocation of costs/revenue requirements re roads and drainage benefit criteria and cost apportionment methodology developed in prior task.	0	8	8	8	24
1.5	Update assessment model to serve as assessment property roll and assessment determination model to include property impact analysis. Model will calculate assessment rates by property class and will calculate specific assessments for each parcel based upon its classification and proper application of the assessment rates.	0	1	2	8	11
1.6	Conduct internal review of model with consulting team and adjust.	1	1	1	4	7
1.7	Conduct in person interactive work session with City staff to review preliminary model results.	0	8	8	8	24
1.8	Make adjustments based upon input from the prior sub-task.	0	0	2	4	6
1.9	Conduct second interactive work session with City staff via internet conference to review adjusted results.	2	2	2	2	8
1.10	Make adjustments based upon input from interactive work session.	0	0	1	2	3
Task 2: Review Results with City Management and City Commission						
2.1	Prepare presentation for City Management meeting.	1	1	2	0	4
2.2	Meet with City Management to review preliminary results (this is anticipated to be in November 2018).	0	8	8	8	24
2.3	Make adjustments based upon input from City Management, review with City staff and finalize.	0	1	2	4	7
2.4	Prepare presentation for City Commission workshop, review with City staff and adjust.	0	1	2	0	3
2.5	Present results to City Commission in workshop #1 (this will be in December 2019).	8	8	8	8	32
2.6	Make adjustments based upon input from City Commission workshop in prior sub-task.	0	1	2	4	7
2.7	Present results to City Commission in workshop #2 (this could be a follow-up to the first Commission workshop in the first quarter of 2019, or it could be another meeting after the update in June in sub-task 3.9).	0	8	8	8	24
2.8	Make adjustments based upon input from City Commission workshop in prior sub-task.	0	1	2	4	7
2.9	Adjust Assessment Model with updated property data and FY 2019 Budget data (this will take place in June 2019).	1	1	2	8	12
2.10	Review updated Assessment rates and assessment roll with District staff in an internet conference.	2	2	2	2	8
2.11	Present results to City Commission in workshop #3 (this will take place after the update in sub-task 3.9).	8	8	8	8	32
2.12	Make adjustments based upon input from City Commission workshop in prior sub-task.	0	1	2	4	7
Task 3: Prepare and Present Report						
3.1	Prepare Draft Report.	1	2	4	8	15
3.2	Review Draft Report with City staff.	1	1	1	1	4
3.3	Prepare Final Report.	1	1	2	4	8
3.4	Present Final Report to City Commission for approval to advertise for and conduct a public hearing.					
--- At Hourly Rates if Required ---						
TOTAL ESTIMATED MAN-HOURS - WORK ELEMENT 1		27	66	82	108	283
TOTAL ESTIMATED CONSULTING FEE - WORK ELEMENT 1		\$8,883	\$17,886	\$14,514	\$14,256	\$55,539



Position	Rate
Project Principal	\$329
Project Manager	\$271
Project Consultant	\$177
Project Analyst	\$132