

The City of Ocala implemented a fire assessment program in 2021 to support its fire rescue services, which is charged to all properties in the city. The assessment program structure was later refined to provide a more equitable rate schedule and last updated in 2022. At this time, the City is interested in updating the fire assessment study.

Benesch (formerly Tindale Oliver) and Susan Schoettle-Gumm have extensive understanding of fire operations funding options and associated legal requirements and limitations, which enables providing the scope of services in which the City is interested.

PROJECT APPROACH

This section provides a description of the tasks to be undertaken by the Benesch Team for the City of Ocala Fire Assessment study. The methodology included in this scope of services conforms with applicable laws, administrative rules, and regulations of the State of Florida—specifically, the following and other related Florida Statutory and case law requirements for a valid special assessment:

- > The service provided must confer a special benefit to the property being assessed.
- > The costs assessed must be fairly and reasonably appropriated among the properties that receive the special benefit.
- > The apportionment or exemption from apportionment of non-ad valorem assessments to the various classifications of governmental entities as defined by Florida law.

The following paragraphs outline tasks that will be completed as part of the study.

Task 1 – Background Review and Kickoff Meeting

Upon receipt of the notice to proceed, the Benesch Team will conduct a kick-off meeting with the City staff and administration to discuss study goals, methodology and any issues/concerns regarding the current assessment structure, schedule, and other issues/questions.

Incident data for 2022 and adopted budget for FY 2023 will be obtained from the City. For property units and classification, data maintained by the Marion County Property Appraiser’s Office will be used. Benesch has extensive experience in working with the property appraiser databases and understands variations that are important to incorporate into the assessment program.

Task 2 – Technical Study

Update of the fire assessment program will be completed

using the City’s current methodology and include the following subtasks.

Task 2a – Analysis of Budget Information

Benesch will evaluate Ocala Fire Rescue’s current adopted budget and budget request for Fiscal Year 2024 (if available).

Similar to previous studies, the full cost of providing fire service delivery that includes all direct and indirect costs will be identified. The analysis will take into consideration any outstanding funding needs, as well as fluctuations in the budget due to larger non-recurring expenditures. The budget used for the study will incorporate the full costs of services, including:

- > Net fire rescue services
- > Fair apportioning to include equipment/capital improvements and associated financing costs if bonds/capital loans are used to fund the necessary capital
- > Implementing programs
- > Collecting assessments
- > Creating assessment rolls

Given that special assessments are limited to fire prevention/suspension and first response medical service related expenses, expenses related to advanced life support services will be excluded in identifying the assessable budget.

Any dedicated revenues (such as fire impact fees, fire inspection fees, etc.) that need to be accounted for will be identified.

Task 2b – Analysis of Service Demand Using Proposed Methodology

The Benesch Team will obtain fire rescue call response data for 2022 from Ocala Fire Rescue to determine the appropriate service demand using the current adopted assessment methodology. This data will be added to the incident data used in the 2022 study to achieve a larger sample size.

Benesch will analyze the historical call data to identify the calls that should be excluded from the analysis and determine a trend in the distribution of remaining incidents between the different assessment rate classes. This analysis also will include a review of the different incident types and on-scene procedures to ensure that only those incidents appropriate for use in the service demand analysis are included.

Finally, the frequency and the level of staff and vehicle time

used for each type of incident/property will be evaluated. Certain types of land uses or buildings may not request assistance frequently, but their response duration may be longer.

Any agreements with other service providers or entities, reports, and other data pertaining to the provision of fire rescue services will be evaluated.

Task 2c – Calculation of Development Units

To determine the number of development units for each assessment rate class, Benesch will obtain the most recent copy of City properties from the Marion County Property Appraiser database.

Each property will be assigned an appropriate assessment rate class. Properties that need to be exempted, such as agricultural land, unbuildable land, very small parcels, parking structures, etc., will be identified and excluded.

Task 2d – Calculation of Rates, Revenue Requirements, and Rate Calculator

Based on the current adopted methodology and the apportioned costs for each land use and calculated development units, a rate schedule will be developed. A preliminary assessment roll will be developed.

In addition, a rate calculator will be developed to assist the City in analyzing different rate scenarios and revenue projections.

Task 3 – Review of Legal Sufficiency and Development of Technical Report

Susan Schoettle-Gumm will provide a legal sufficiency review and ensure that the approach used complies with all legal requirements.

The results of the Tasks 1, 2, and 3 analyses will be provided in a technical report. The Benesch Team will present the study results to City staff and administrators.

Based on input received from the City, a final report will be submitted. Benesch will present the study results to the City Council and respond to questions.

Task 4 – Implementation Assistance

Based on the input received from the City, Benesch and Susan Schoettle-Gumm will assist the City in the implementation of the program. More specifically, the following will be provided:

- > One City Council Workshop to present study results and

respond to questions.

- > Two public meetings to assist with the adoption of the study and rates.
- > Assistance with resolution update and accounting policies.
- > Assistance in responding public comments/questions.
- > Certification of the fire assessment roll in accordance with Florida Statutes.

All deliverables and source files will be provided to the City in Microsoft Word and Excel file formats.

PROJECT BUDGET

As shown in the detailed budget table on the next page, the professional fees and expenses associated with the City of Ocala Fire Assessment Study contract are estimated at \$59,590, which includes two virtual and three in-person meetings.

This is a lump sum budget which includes all services. The City will be invoiced monthly for the portion of the work completed and only for meetings that are used.

Any additional meetings will be invoiced at the following rates.

- > Benesch: \$3,200 per in-person meeting; \$2,000 per virtual meeting.
- > Susan Schoettle-Gumm: \$1,365 per in-person meeting; \$500 per virtual meeting.

Benesch will be happy to respond to any questions from the City of Ocala staff to clarify our proposed cost and/or provide additional information as necessary.

**City of Ocala Fire Assessment Study
Benesch Proposed Project Budget**

| TASK # | SUBTASK DESCRIPTION | Project Director/ Sr. Project Manager \$220.00 | Legal Attorney \$195.00 | Senior Eng/P/In \$120.00 | Planner/ GIS Specialist \$85.00 | Admin/ Clerical \$60.00 | TOTAL TASK HOURS | BURDENED COST/ TASK |
|-----------------------------|--|--|----------------------------|-----------------------------|---------------------------------------|-------------------------------|------------------|------------------------|
| TASK 1 | BACKGROUND REVIEW / DATA COLLECTION | 7.0 | 1.0 | 6.0 | 2.0 | 3.0 | 19.0 | \$2,805 |
| 1.1 | Send Data Request Memorandum | 1.0 | | 2.0 | | 1.0 | 4.0 | \$520 |
| 1.2 | Review Background Materials | 4.0 | | 4.0 | 2.0 | 1.0 | 11.0 | \$1,590 |
| 1.3 | Kick-off Meeting (Virtual) | 2.0 | 1.0 | | | 1.0 | 4.0 | \$695 |
| TASK 2 | UPDATE OF SPECIAL ASSESSMENT METHOD | 50.0 | 0.0 | 66.0 | 71.0 | 4.0 | 191.0 | \$25,195 |
| 2.1 | Service Demand Analysis | 12.0 | | 18.0 | 15.0 | 1.0 | 46.0 | \$6,135 |
| 2.2 | Fire/Rescue Budget Analysis | 11.0 | | 8.0 | 9.0 | 1.0 | 29.0 | \$4,205 |
| 2.3 | Calculation of Development Units | 15.0 | | 25.0 | 29.0 | 1.0 | 70.0 | \$8,825 |
| 2.4 | Calculation of Rates and Revenue Requirements | 12.0 | | 15.0 | 18.0 | 1.0 | 46.0 | \$6,030 |
| TASK 3 | REVIEW LEGAL SUFFICIENCY AND TECHNICAL REPORT | 21.0 | 8.0 | 14.0 | 8.0 | 3.0 | 54.0 | \$8,720 |
| 3.1 | Technical Report Review for Legal Sufficiency | 5.0 | 6.5 | | | 1.0 | 12.5 | \$2,428 |
| 3.2 | Development of the Draft and Final Technical Reports | 10.0 | | 12.0 | 6.0 | 1.0 | 29.0 | \$4,210 |
| 3.3 | Draft Report Review Meeting with City Staff & Administration (Virtual) | 6.0 | 1.5 | 2.0 | 2.0 | 1.0 | 12.5 | \$2,083 |
| TASK 4 | IMPLEMENTATION ASSISTANCE | 41.0 | 46.0 | 24.0 | 20.0 | 5.0 | 136.0 | \$22,870 |
| 4.1 | Development of the Final Assessment Roll | 6.0 | | 15.0 | 13.0 | 1.0 | 35.0 | \$4,285 |
| 4.2 | Legal Assistance | 8.0 | 23.0 | 2.0 | | 1.0 | 34.0 | \$6,545 |
| 4.3 | Addressing Public Comments | 6.0 | 2.0 | 3.0 | 3.0 | 1.0 | 15.0 | \$2,385 |
| 4.4 | Public Meetings (3) | 21.0 | 21.0 | 4.0 | 4.0 | 2.0 | 52.0 | \$9,655 |
| TOTAL PROJECT BUDGET | | | | | | | 400.0 | \$59,590 |