

**SUN N' LAKE OF SEBRING IMPROVEMENT DISTRICT**

**REQUEST FOR PROPOSALS  
MAINTENANCE ASSESSMENT RATE STUDY  
RFP No. 17-12**

**LEGAL ADVERTISEMENT**

The Sun 'n Lake of Sebring Improvement District hereby requests proposals for a Maintenance Assessment Rate Study. Specifications can be found at [www.snldistrict.org](http://www.snldistrict.org).

Sealed proposals may be hand delivered or mailed to the District office located at 5306 Sun 'N Lake Blvd., Sebring, FL 33872, Proposal for Maintenance Assessment Rate Study, RFP No. 17-12, Attention Tanya Cannady, General Manager by 2:00 p.m. on Wednesday, January 24, 2018. Proposers must provide five (5) copies of their proposal.

The District reserves the right to accept or reject any or all proposals and to re-advertise for proposals when deemed in the best interest of the District.

**END OF ADVERTISEMENT**

**RFP No. 17-12 (continued)**

**I. SCOPE OF SERVICES**

The Sun ‘n Lake of Sebring Improvement District (hereafter “the District”) requests proposals from qualified firms or individuals to review the District’s maintenance assessment rates and provide a recommended benefit equivalency factor per property use type. Once the benefit factor is determined, then provide a recommendation of a rate structure that is relative to the benefit received by the lot.

The current methodology used by the District is available on our website as Attachment A to this proposal titled “*Sun ‘n Lake of Sebring Improvement District Maintenance Services Assessment Program.*” This program was adopted by the District for the fiscal year 2000/2001.

Maintenance assessments are billed annually in October. Lots are categorized under the Department of Revenue (DOR) Codes assigned by Highlands County Property Appraiser’s Office and rates are structured based on the DOR code assigned to the lot. The number of lots under each DOR code is Attachment B. Three general categories exist for lots; improved residential, improved non-residential or unimproved property. Rates have remained the same since October 2009 and the current assessment rates are available on our website as Attachment C to this proposal titled “*Assessment Rates for the fiscal year 2017/2018.*” In addition, the District’s 2017/2018 adopted budget is on our website under Departments, Finance & Accounting, Budget, 2018 Budget. Maintenance assessments are budgeted revenues in the General Fund.

**II. DESCRIPTION OF THE DISTRICT**

Sun ‘n Lake of Sebring Improvement District (the District) was created by the Board of County Commissioners of Highlands County, Florida on April 6, 1974. The District encompasses approximately 5,700 acres on Highway 27 between the Cities of Avon Park and Sebring. Highlands County Ordinance 77-4 is referred to as the District Charter.

The District is defined as an independent special district under the Uniform Accountability Act of 1989, otherwise known as Chapter 189 of the Florida Statutes. Chapter 189 mandates certain requirements for the formation, dissolution and reporting of special districts.

The District’s major activities include operation and maintenance of two golf courses, restaurant, water and sewer system, roads, security, code enforcement, recreation, and general government services.

**III. CONTACT PERSON**

Inquiries concerning this RFP shall be e-mailed to the attention of Tanya Cannady, CPA, CDM- General Manager at [tcannady@snldistrict.org](mailto:tcannady@snldistrict.org). She will be the principal contact with the District and will coordinate the assistance to be provided by the District.

**IV. PROPOSAL REQUIREMENTS**

A. Required Documents

1. Five sealed proposals
2. Transmittal letter
3. Technical proposal including timing of the draft report delivery and final report delivery
4. Firm or individual qualifications and experience
5. Fees to perform the study
6. References

**V. PROPOSAL EVALUATION**

The proposals will be evaluated by District management. Evaluations will be based on the firm or individual's experience, quality, references and overall ability to meet the needs of the District. The District Board of Supervisors will award the proposal in the February 2018, District Board meeting.

**VI. TERMS AND CONDITIONS**

- A. The Sun 'n Lake of Sebring Improvement District reserves the right without prejudice to reject any or all proposals, to request clarification of information submitted, and to request additional information from one or more proposers.
- B. In accordance with Federal, State, and Local regulations, the firm shall not discriminate under the contract against any person.
- C. The firm shall not assign or transfer any interest in the contract without prior approval of the District.
- D. The District intends to enter into contract negotiations with the selected firm or individual. If a contract is not finalized in a reasonable period of time, the District will open negotiations with the next most qualified firm or individual.
- E. The contract may be terminated at any time in whole or in part in writing with 30 days notice in the event of substantial failure by the other party to fulfill its obligations under the contract through no fault of the terminating party.
- F. The proposer to whom a contract is awarded shall be required to enter into a written contract agreement with the District.
- G. All proposals will need to be delivered to, or received in the mail by the due date and time. Any document submitted or received after this date and time shall not be considered and will be returned to the sender unopened. The District takes no responsibility for late mail or late delivery service.

**VI. TERMS AND CONDITIONS (continued)**

- H. The award hereunder is subject to Chapter 112, Florida Statutes. All proposers must disclose with their proposal the name of any officer, director or agent who is also an employee of the District. Further, all proposers must disclose the name of any District employee who owns, directly or indirectly, any interest of ten percent (10%) or more of the proposer's firm or any of its locations. The proposer to whom a contract is awarded shall be required to enter into a written contract agreement with the District in a form approved by legal counsel for the District. This RFP and the proposal, or any part thereof, may be incorporated into and made a part of the final contract. The District reserves the right to negotiate the terms and conditions of the contract with the selected proposer