

**South Walton Fire District
REQUEST FOR PROPOSALS
Independent Special Fire Control District Performance Review**

The South Walton Fire District ("District") is requesting proposals from consultants or certified public accountant firms ("Consultant") interested in providing a performance review of the District in accordance with Section 189.0695, Florida Statutes ("F.S."), which will be memorialized within a formal report ("Project").

An information packet containing details of the Project and the Request for Proposals ("RFP") submittal requirements may be obtained from Robbie Lund; Administrative Assistant rlund@swfd.org. The information packet is also available at the District's website <https://www.swfd.org/news-notices>. Any questions concerning this RFP must be presented in writing via email to Carole Martin; Fiscal Officer cmartin@swfd.org no later than June 15th, 2022, at 4pm Central Standard Time. All responses to questions and addenda, if applicable, will be posted on the District's website.

Consultant selection will be in accordance with the District's Procurement Policy, and the RFP information packet. Consultants desiring to provide this service to the District must submit four (4) copies and one (1) electronic PDF copy on an USB drive of their proposal in accordance with the requirements contained in the information packet to the attention of Fire Chief/Administrator Ryan Crawford at the address below no later than 4pm Central Standard Time on July 6th, 2022:

South Walton Fire District
Attention: Fire Chief
911 North County Highway 393
Santa Rosa Beach, FL 32459

Dated this 1st day of June 2022:

Ryan H. Crawford, Fire Chief
South Walton Fire District

South Walton Fire District

REQUEST FOR PROPOSALS

Independent Special Fire Control District Performance Review

The South Walton Fire District (“District”) is requesting proposals from consultants or certified public accountant firms (“Consultant”) interested in providing a performance review of the District in accordance with Section 189.0695, Florida Statutes (“F.S.”), which will be memorialized within a formal report (“Project”).

A. District Background

The District is a self-governing independent special fire control district, located in Walton County, established by the Florida Legislature and operating in accordance with Chapter 2000-491, as amended, (“Charter”), and Chapters 189 and 191, F.S. It is an independent governmental unit whose primary source of operating funds is Ad Valorem Taxes which are budgeted at \$21.8 million for the 2021-2022 fiscal year. The total operating expense budget is \$25.8 million for the 2021-2022 fiscal year.

The District operates from five (5) fire stations and employs 185 people. The District provides services in the following functional areas:

- a) Fire Suppression
- b) Fire Prevention, Technical, and Plan Review
- c) Technical Rescue Response
- d) EMS First Response – BLS Level
- e) EMS First Response – ALS Level
- f) EMS Transport – BLS Level
- g) EMS Transport – ALS Level
- h) Beach Safety / Surf Rescue
- i) Public Fire and Life Safety Education
- j) Fleet & Emergency Vehicle Maintenance
- k) Emergency Communications/911 Public Safety Answering Point
- l) Training and Professional Development
- m) Support Services (Information Technologies, Facilities Maintenance)

B. Performance Review Background

In 2021, Section 189.0695, F.S., was created and requires all independent special fire control districts to conduct a performance review every five years beginning October 1, 2022. With the exception of independent special fire control districts located within a rural area of opportunity, all independent special fire control districts must contract with an independent entity to conduct the performance review. The independent entity must have at least five (5) years of experience conducting comparable reviews of organizations similar in size and function to the independent special fire control district under review, must conduct the review according to applicable industry

best practices, and may not have any affiliation with or financial involvement in the reviewed independent special fire control district. The completed performance review will be filed with the District's governing board, the Auditor General, the President of the Senate, and the Speaker of the House of Representatives no later than July 1, 2023.

C. Scope of Work

The successful Consultant will perform a performance review which is defined as an evaluation of the District and its programs, activities, and functions. The term includes research and analysis of the following:

- The special district's purpose and goals as stated in its charter.
- The special district's goals and objectives for each program and activity, the problem or need that the program or activity was designed to address, the expected benefits of each program and activity, and the performance measures and standards used by the special district to determine if the program or activity achieves the district's goals and objectives.
- The delivery of services by the special district, including alternative methods of providing those services that would reduce costs and improve performance, including whether revisions to the organization or administration will improve the efficiency, effectiveness, or economical operation of the special district.
- A comparison of similar services provided by the county and municipal governments located wholly or partially within the boundaries of the special district, including similarities and differences in services, relative costs and efficiencies, and possible service consolidations.
- The revenues and costs of programs and activities of the special district, using data from the current year and the previous three (3) fiscal years.
- The extent to which the special district's goals and objectives have been achieved, including whether the goals and objectives are clearly stated, measurable, adequately address the statutory purpose of the special district, provide sufficient direction for the district's programs and activities, and may be achieved within the district's adopted budget.
- Any performance measures and standards of the special district's programs and activities using data from the current year and the previous three (3) fiscal years, including whether the performance measures and standards:
 - Are relevant, useful, and sufficient to evaluate the costs of the programs and activities.
 - Are being met.
 - Should be revised.
- Factors that have contributed to any failure to meet the special district's performance measures and standards or achieve the district's goals and objectives, including a description of efforts taken by the special district to prevent such failure in the future.
- Recommendations for statutory or budgetary changes to improve the special district's program operations, reduce costs, or reduce duplication, including the potential benefits to be achieved and the potential adverse consequences of the proposed changes.

The performance review must be conducted in accordance with the applicable industry best practices (including but not limited to the National Fire Protection Association, Center for Public Safety Excellence, and the Insurance Services Office).

Although the Consultant is being hired to complete a performance review required by Section 189.0695, F.S., the Consultant's client will be the District and not the Florida Legislature. As a result, the District's Fire Chief/Administrator will approve the report prior to being submitted to the State.

The Consultant's evaluation will be documented in a draft report, which shall include a section on each paragraph provided in Section 189.0695(1)(a)-(i), F.S. The Consultant shall provide the draft report to the District and have a meeting with the District's Fire Chief/Administrator and appropriate staff to discuss the draft report, including the results, conclusions, observations, and recommendations. The Consultant may be required to revise the draft report to address the issues raised during the meeting. The District shall have at least two (2) weeks to review the draft report and submit responding comments to the Consultant. If timely received, the Consultant shall include the District's responding comments in the Consultant's final report, which shall be included in a separate section of the final report. Upon completion of the final report, the Consultant shall provide an electronic copy, which must be ADA compliant, and five (5) printed and bound copies of the final report to the District. In addition, all relevant electronic files will be provided in their native format on a USB drive.

If requested, the Consultant will deliver a final presentation to the District's Board of Fire Commissioners. In addition, the Consultant will submit the final report to the State Auditor, Florida Senate President, and Florida House of Representatives Speaker no later than seven (7) days from the presentation to the Board of Fire Commissioners, if requested, or submission of the final report to the District, whichever is later.

The District intends that the Project should be completed within 36 weeks of the execution of the contract.

D. Price

The District will pay a fixed fee to be paid upon the receipt and approval of the final report by the District. The stated fee shall include all costs associated with completion of the Project and there shall be no hidden costs.

Full disclosure of nature and amount of all fees and charges is mandatory. The District shall not be responsible for the reimbursement of any costs not specifically set forth in the Consultant's proposal. The District reserves the right to accept or reject any part or all of the Consultant's fee schedule. Any reimbursement of expenses approved by the District shall be in accordance with the District's per diem policy for consultants.

E. General Project Schedule

A summary schedule for Consultant selection for the Project is presented below. Dates may be changed at the discretion of the District.

Milestone	Expected Date of Completion
Advertise for Consultant RFP	June 1, 2022
Final Date for Questions	June 15, 2022
Proposals Submittals Due to the District	July 6, 2022
Selection Committee Meeting to Consider Consultant Rankings	July 13, 2022
Selection Committee Meeting to Interview Ranked Consultants (If needed)	July 27, 2022
Consultant Selection	August 8, 2022 (Board Action)

All Selection Committee meetings are publicly noticed, and members comply with Florida’s Sunshine Law. Upon review of the proposals, the Selection Committee may schedule presentations and interviews. The Selection Committee’s ranking and a recommendation to select a Consultant will be presented to the District Board of Fire Commissioners (“Board”) for consideration. Proof of insurance from the selected Consultant meeting the requirements of the contract, described below, is required at the time of Board’s approval of the selection.

The District reserves the right to delay scheduled dates if determined to be in the best interest of the District. Any changes, delays, or addenda related to this Request for Proposals (“RFP”) will be posted on the District’s website.

F. Consultant Selection Process

Consultant selection shall be in accordance with the District’s Procurement Policy (adopted December 12th 2019). The District’s Procurement Policy can be viewed in its entirety on the District’s website at <https://www.swfd.org/SWFD/media/data/pdf/SOG-207-Procurement-Policy.pdf> A copy of the District’s contract proposed for the Project is included in this RFP. The Project contract contains minimum insurance requirements that must be satisfied for the contract to be executed by the District. The contents of the proposal of the successful Consultant will be incorporated into a written agreement in terms acceptable to the District at its absolute discretion. By submitting a proposal, Consultant agrees to all the terms and conditions of this RFP and those included in the District’s Project contract. If Consultant desires to propose a change to a term or condition of this RFP or the District’s contract, Consultant must submit its request by submitting a question as provided for below.

This selection process is intended to result in execution of a contract with one prime Consultant for work required in the Project. Two (2) or more Consultants may combine for the purpose of responding to this RFP provided that one Consultant is designated as the “Prime” Consultant and the other as a subconsultant and that the RFP was made without collusion and is in all respects, fair and in good faith.

After issuance of this RFP, prospective Consultants or their agents, representatives or persons acting at the request of such Consultant are prohibited from contacting members of the District's Board, the Fire Chief, or any member of the Selection Committee concerning this RFP until after the final recommendation is presented to the Board for approval or when the solicitation has been canceled or terminated. Any questions concerning this RFP must be presented in writing via email to Carole Martin; Fiscal Officer, cmartin@swfd.org no later than June 15, 2022. Consultants are responsible to review the District's website for the District's responses to any questions timely submitted or any addenda issued.

G. Consultant Minimum Requirements

The Consultant must have at least five (5) years of experience conducting comparable reviews of organizations similar in size and function to the District and must also have no affiliation with or financial involvement in the District. By submission of a proposal, the Consultant attests to these Consultant minimum standards.

H. RFP Minimum Requirements

The proposal must (at a minimum) include the following:

1. Legal name, address, phone number and email of Consultant;
2. Principal office locations of submitting Consultant and any proposed partners/subconsultants;
3. Legal form of company, i.e., partnership, corporation, joint venture, (if joint venture, identify the members);
4. Briefly state understanding of the Project and provide a positive commitment to perform the work;
5. Describe approach to the Project and proposed timeline;
6. Describe Consultant's ability to produce the final product and innovative concepts that may enhance value and quality and favorable cost containment approaches or additional or alternative ideas that may be successful if implemented;
7. Qualifications and professional experience for Consultant's "Project Manager" who is proposed to serve as point of contact for the Project, including experience of comparable reviews of organizations similar in size and function to the District;
8. Qualifications and professional experience of other key personnel who will be assigned to conduct project services listed above, and the location of the office to which they are assigned, including experience of comparable reviews of organizations similar in size and function to the District per key personnel;
9. Current and projected workloads for proposed key staff during proposed project timeframe;

10. Description and examples of a minimum of three (3) projects completed by Consultant similar to the Project for organizations similar in size and function to the District, including whether the project was for a Florida local government, description of the project, budget, and duration/completion time information;
11. A matrix, using the Experiences Summary Matrix included within this RFP showing the projects listed in RFP Requirements 10 and included within the References Form in rows on the left side of the matrix and the key personnel (in response to RFP Requirements 7 and 8) in columns on the top of the matrix to create a matrix, using an "X" to indicate which projects the key personnel were involved in at the intersections of the rows and columns in the matrix;
12. List of at least three (3) clients that the District can contact as references with respect to Consultant's work performance on projects similar to the Project, using the Reference Form included within this RFP;
13. Summary and disposition of any individual cases of litigation, judgments and/or legal actions, entered against Consultant or subconsultant(s) for breach of contract for work performed for any local, state, federal, public, or private entity, by any state or federal court, within the last five (5) years, or if no judgment was entered, please also include any litigation that has been filed against Consultant or its subconsultants for breach of contract for work performed for any local, state, federal, public, or private entity, by any state or federal court, within the last five (5) years;
14. Detailed cost for the Project; and
15. Required forms:
 - Key Personnel Form;
 - Experiences Summary Matrix;
 - Signed Sworn Statement under Section 287.133(3)(a), Florida Statutes, on Public Entity Crimes;
 - Reference Forms; and
 - E-Verify Affidavit.

For RFP Requirements 7 and 8, Consultant should also include for the Project Manager and key personnel, any experience, by person, in: emergency service master planning, strategic planning, fiscal analysis, incident analysis, cooperative services analysis, EMS delivery, staffing assessments, and benchmarking, if applicable.

The proposal shall be limited to no more than twenty-five (25) one-sided pages for all requested information described herein including the required forms listed in RFP Requirement 15 above. Front and back covers, transmittal letter, and section dividers are excluded from the twenty-five (25) page limit. All pages shall be standardized 8 ½ x 11 inches in size, margins not less than 1-inch, standard black text and minimum twelve (12) point font size.

Consultants desiring to provide these professional services to the District must submit eight (8) paper copies (one (1) copy shall be unbound) and one (1) electronic PDF copy on a USB drive of their proposal in accordance with the requirements contained in this RFP to:

South Walton Fire District
 Attention: Fire Chief/Administrator
 911 North County Highway 393
 Santa Rosa Beach, FL 32459

The proposal may be submitted by U.S. Mail (postage paid), courier service, or by hand delivery. Proposals must be identified with “RFP - Independent Special Fire Control District Performance Review -- Do Not Open” marked on the sealed package. If sent via courier service, they must be placed in a sealed envelope properly identified within the courier package. A Consultant’s proposal must be received no later than July 6th, 2022, at 4pm Central Standard Time at the above referenced address. It is the Consultant’s responsibility to assure that its proposal is delivered to the District prior to the above deadline. The District will not be responsible for any lost or late arriving proposals sent via the U.S. Postal Service or other delivery services. Late submittals will not be opened or considered. Proposals that are incomplete, conditional, obscure, or do not conform to the requirements contained in this RFP may be deemed nonresponsive at the sole option of the District. The District reserves the right to reject all responses and not grant any award resulting from this RFP. If awarded, no contract will be formed between the Consultant and the District until an agreement is executed by both parties.

Upon submittal of its proposal, the Consultant agrees to be bound by all terms and conditions of the RFP. Neither the District nor its representatives will be liable for any expenses incurred in connection with preparation of a response to this RFP.

I. RFP Evaluation Criteria

Criteria	Weighting
Consultant (team) Competence/Qualifications/Services	25 points

Consultant Competence/Qualifications/Services section shall address:

- *Team capability to perform the work;*
- *Consultant’s location(s) and Consultant’s years of experience;*
- *Consultant’s commitment of time and resources to the District; and*
- *Any litigation against the Consultant and/or subconsultants.*

Similar Experience and Past Professional Accomplishments	25 points
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The Similar Experience and Past Professional Accomplishments section shall address:

- *Prior experience providing professional services by Consultant as well as each of its*

subconsultants;

- *Related governmental work including references for the Project Manager and key personnel (in addition to the mandatory Reference Form), including whether Consultant has experience working with Florida local governments, and past performance;*
- *Experience of Project Manager and key personnel to be assigned to the District, including demonstrated knowledge and understanding of the types of services to be performed; and*
- *Consultant's current or past projects with detailed Information on schedule adherence, quality of work, and project cost control.*

Project Approach and Understanding

25 points

The Project Approach and Understanding section shall address:

- *Consultant's approach to the Project and proposed timeline; and*
- *Ability of Consultant to produce the final product and innovative concepts that may enhance value and quality and favorable cost containment approaches or additional or alternative ideas that may be successful if implemented*

Price

25 points

The Price section shall address the Consultant's proposed Project cost.

TOTAL

100 points

J. Procurement Policy and Protests

Consultants are hereby placed on notice of the existence of the Procurement Policy, and is considered to be on constructive notice of all provisions contained therein. A copy is available at the District Office at 911 North County Highway 393, Santa Rosa Beach, FL 32459, and on the District's website a <https://www.swfd.org/SWFD/media/data/pdf/SOG-207-Procurement-Policy.pdf> Notice of all District decisions concerning a competitive solicitation or award, shall be electronically posted on the District's website. By submitting a proposal, Consultants agree to the process set forth in these instructions.

1. Notice of Protest/Formal Written Protest

A Consultant adversely affected by this RFP shall file a notice of protest, in writing, seventy-two (72) hours prior to the date and time on which proposals are to be received and shall file a formal written protest within ten (10) days after filing the notice of protest.

Any Consultant adversely affected by the District's decision concerning this RFP or award, or any Consultant adversely affected by the District's decision to reject all proposals, shall file a formal written protest within seventy-two (72) hours after the District's electronic posting of the notice of decision on its website.

No time will be added to the above time limits for mail service.

2. Contents of Formal Written Protest

The formal written protest shall be printed or typewritten, and shall contain:

- a) The name and address of the Consultant filing the protest and an explanation of how they are adversely affected;
- b) A statement of how and when the RFP or notice of District decision or intended decision was received;
- c) A statement of all disputed issues of material fact, and if there are none, a statement so indicating;
- d) A concise statement of the ultimate facts alleged, as well as the rules or statutes which entitle the protestor to relief;
- e) A demand for relief; and
- f) Any other information material to the protest.

3. Filing

All notice of protests and formal written protests shall be filed with the District's Administrative Assistant, Robbie Lund, Monday through Friday, excluding holidays, during normal business hours. Filings may be submitted via hand delivery, U.S. Mail, or other delivery/courier service. Filings will not be accepted via email. A notice of protest or formal written protest is not timely filed unless received by the District within the prescribed time limit. Failure to file a notice of protest, if required, or a formal written protest within the time prescribed in these instructions shall constitute a waiver of all claims.

4. Stay of Procurement

Upon receipt of a formal written protest that has been timely filed, the RFP or contract award process shall be stayed until the subject of the protest is resolved by final action by the Board, unless the Fire Chief/Administrator, with the concurrence of the Board, sets forth in writing particular facts and circumstances that require the continuation of the contract solicitation process through award without delay in order to avoid an immediate and serious threat or loss to the public health, safety, property, or welfare. Notice that a contract solicitation has been stayed shall be given by either electronic mail or U.S. mail to all Consultants.

5. Resolution of Formal Written Protest

The Fire Chief/Administrator, or his designee, shall consider and investigate all written protests in a timely manner. The District shall provide an opportunity for the protestor to meet with the Fire Chief/Administrator, or his designee, to resolve the protest by mutual agreement within seven (7) days, excluding Saturday, Sunday, and holidays, of receipt of a formal written protest. The District may grant extensions of time to conduct this meeting for good cause shown.

If the subject of a protest is not resolved pursuant to this meeting, the Fire Chief/Administrator shall certify in writing that there was no resolution. The Fire Chief/Administrator will make a recommendation to the Board, and the Board will then make a final decision to either uphold the recommendation, reject the recommendation, and send it back for further action, reject all proposals, or do something other than what the Fire Chief/Administrator has recommended.

K. Public Availability of Records

Once opened, all proposals will become the property of the District and, at the sole discretion of the District, may not be returned to Consultant. Any information, reports, or other materials given to, prepared, or submitted in response to this RFP will be subject to the provisions of Chapter 119, F.S., Public Records Act. Any Consultant claiming that its proposal contains information that is exempt from Chapter 119, F.S., must clearly segregate and mark that specific information and provide the specific statutory citation for such exemption. Section 119.071(1)(b), F.S., exempts sealed proposals from inspection, examination, and duplication until such time as the District issues a notice of intended decision or within thirty (30) days after the proposal opening, whichever comes first. This exemption is not waived by the public opening of the proposals. Any questions regarding the application of Chapter 119, F.S., to this RFP can be directed to the District's public records custodian by telephone at (850) 267-1298, or by email at rlund@swfd.org.

L. Additional Requirements

1. Scrutinized Companies

Pursuant to Section 287.135, F.S., a company that, at the time of bidding or submitting a proposal for a new contract or renewal of an existing contract, is on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, shall be ineligible for, and may not bid on, submit a proposal for, or enter into or renew a contract with an agency or local governmental entity for goods or services of any amount. Consultant may not submit a bid if it is on the aforementioned list. By submitting a proposal, the Consultant must certify that it is not on the aforementioned list.

2. Public Entity Crimes

Pursuant to Subsections 287.133(2)(a) and (3)(a), F.S., a person or an affiliate who has been placed on the convicted vendor list following a conviction for public entity crime may not submit a bid on a contract to provide any goods or services or for the construction or repair of public building or public work to a public entity, may not submit bids, proposals, or replies on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subconsultant, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, F.S., for category two for a period of thirty-six (36) months from the date of being placed on the convicted vendors list. Consultant shall submit with its proposal a properly executed and notarized Public Entity Crimes Statement.

3. Equal Employment Opportunity

The District, in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat. 252) and the Regulations of The Department of Commerce (15 CFR, Part 8) issued pursuant to such act, hereby notifies all Consultants that it will affirmatively ensure that in any contract entered into pursuant to this RFP, minority business enterprises will be afforded full opportunity to submit proposals in response to this RFP and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award.

4. Conflicts of Interest

The award under this RFP is subject to the provisions of Chapter 112, F.S., as amended, governing conflicts of interest. All Consultants must disclose with their proposal the name of any officer, director, or agent who is also a public employee. Further, all Consultants must disclose the name of any public employee who owns, directly or indirectly, an interest of five percent (5%) or more in Consultant's firm or any of its branches.

5. Participation in E-Verify System

In accordance with Section 448.095, F.S., beginning January 1, 2021, every public employer, contractor, and subconsultant shall register with and use the E-Verify System to verify the work authorization status of all newly hired employees. The submission of an executed affidavit from the Consultant and any subconsultants stating it is in compliance with Section 448.095, F.S., and all employees hired on and after January 1, 2021, have had their work authorization status verified through the E-Verify system shall satisfy this requirement. Any contract awarded pursuant to this RFP shall be terminated by the District if the District has a good faith belief that the successful Consultant or subconsultant thereof has knowingly violated this requirement.

SWORN STATEMENT PURSUANT TO SECTION 287.133(3)(a),
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to South Walton Fire District by

(Print individual's name and title)

for _____

(Print name of entity submitting sworn statement)

whose business address is _____

and (if applicable) its Federal Employer Identification Number (FEIN) is _____

(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: _____).

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:

a) A predecessor or successor of a person convicted of a public entity crime; OR

b) An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts let by a public entity, or which otherwise

transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. **(Indicate which statement applies.)**

___ Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

___ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

___ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. **(Attach a copy of the Final Order.)**

I UNDERSTAND THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES, FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

(Signature)

STATE OF _____

COUNTY OF _____

The foregoing instrument was acknowledged before me by means of physical presence or online notarization, this _____ by _____ of _____, a _____ company organized under the laws of the State of _____, on behalf of the company, who is personally known to me or has produced _____ as identification.

Notary Public

Name (Printed) _____

My commission expires _____.

(Printed typed or stamped Commissioned name of Notary Public)

REFERENCES

Consultant must provide a minimum of three (3) references that meet the requirements in the RFP.

Consultant Name: _____

Reference Entity: _____

Reference Contact Person: _____

Reference Address: _____

Reference Email Address: _____

Reference Phone No.: _____

Project Name: _____

Project Location: _____

Consultant Project Manager: _____

Contract Amount: _____

Date Project Commenced: _____

Date of Final Completion: _____

Description of Work Performed: _____

CONSULTANT E-VERIFY

AFFIDAVIT

I hereby certify that _____ [insert Consultant company name] does not employ, contract with, or subcontract with an unauthorized alien, and is otherwise in full compliance with Section 448.095, Florida Statutes.

All employees hired on or after January 1, 2021, have had their work authorization status verified through the E-Verify system.

A true and correct copy of _____ [insert Consultant company name] proof of registration in the E-Verify system is attached to this Affidavit.

Print Name: _____

Date: _____

STATE OF _____

COUNTY OF _____

The foregoing instrument was acknowledged before me by means of physical presence or online notarization, this _____ by _____ of _____, a _____ company organized under the laws of the State of _____, on behalf of the company, who is personally known to me or has produced _____ as identification.

Notary Public

Name (Printed) _____

My commission expires _____.

(Printed typed or stamped Commissioned name of Notary Public)

SUBCONSULTANT E-VERIFY

AFFIDAVIT

I hereby certify that _____ [insert Subconsultant company name] does not employ, contract with, or subcontract with an unauthorized alien, and is otherwise in full compliance with, Section 448.095, Florida Statutes.

All employees hired on or after January 1, 2021, have had their work authorization status verified through the E-Verify system.

A true and correct copy of _____ [insert Subconsultant company name] proof of registration in the E-Verify system is attached to this Affidavit.

Print Name: _____

Date: _____

STATE OF _____

COUNTY OF _____

The foregoing instrument was acknowledged before me by means of physical presence or online notarization, this _____ by _____ of _____, a _____ company organized under the laws of the State of _____, on behalf of the company, who is personally known to me or has produced _____ as identification.

Notary Public

Name (Printed) _____

My commission expires _____.

(Printed typed or stamped Commissioned name of Notary Public)

Contract

**PROFESSIONAL SERVICES AGREEMENT
BETWEEN THE SOUTH WALTON FIRE DISTRICT
AND**

[insert Consultant's name]

FOR INDEPENDENT SPECIAL FIRE CONTROL DISTRICT PERFORMANCE REVIEW

THIS AGREEMENT is made this ____ day of _____, 2022 ("Effective Date") between [insert Consultant's name], a [insert type of entity], (the "Consultant"), whose address is _____, and the South Walton Fire District (the "District"), an independent special fire control district operating in accordance with Chapter 2000-491, and "as amended" if applicable ("Charter") and Chapters 189 and 191, Florida Statutes, whose address is 911 North County Highway 393, Santa Rosa Beach, FL 32459.

WHEREAS, beginning October 1, 2022, Section 189.0695, Florida Statutes, requires all independent special fire control districts to have a performance review conducted as more fully described in the Scope of Services, attached as Exhibit A, by an independent entity ("Project"); and

WHEREAS, Section 189.0695, Florida Statutes, requires that the independent entity selected to perform the Project must have at least five (5) years of experience conducting comparable reviews of organizations similar in size and function to the independent special fire control district under review, must conduct the review according to applicable industry best practices, and may not have any affiliation with or financial involvement in the reviewed independent special fire control district; and

WHEREAS, Section 189.0695, Florida Statutes, requires that the performance review will be filed with the independent special fire control district's governing board, the Auditor General, the President of the Senate, and the Speaker of the House of Representatives no later than July 1, 2023, and

WHEREAS, the District has selected Consultant in accordance with the Charter, SWFD's Procurement Policy 2019.01 Purchasing of Goods and Services ("Procurement Policy"), and the Project Request for Proposal information packet; and

WHEREAS, Consultant desires to conduct the Project and has the experience, staff, and resources to complete the Project; and

WHEREAS, the Consultant and District have agreed upon a scope of services, schedule, and fee for the Project; and

WHEREAS, the Consultant agrees that the Consultant's client is the District and not the Florida Legislature.

NOW, THEREFORE, in consideration of the mutual covenants and conditions contained herein, the Consultant and the District agree as follows.

SECTION 1. WHEREAS CLAUSES

The foregoing whereas clauses are hereby incorporated into this Agreement and made a part hereof.

SECTION 2. ENGAGEMENT OF CONSULTANT

- A. The District hereby agrees to engage Consultant and Consultant hereby agrees to perform the professional services to the District as set forth in the Scope of Services, attached as Exhibit A, as directed and approved by the District.
- B. Key personnel and subconsultants shall not be assigned to or removed from the Project by Consultant without the prior written approval of the District. Both parties agree that replacement of key personnel and subconsultants must be with equal or more qualified persons and must be approved by the District before a new member works on the Project.
- C. For purposes of this Agreement, successful completion of the Project means the approval of the final report by the District's Fire Chief/Administrator and submission of the final report to the State Auditor, Florida Senate President, and Florida House of Representatives Speaker by the Consultant.

SECTION 3. SCOPE OF SERVICES AND THE CONSULTANT'S RESPONSIBILITY

Consultant shall complete the Scope of Services, which includes the Project tasks, timelines, and deliverables. Any modification to the Scope of Services must be approved in writing by the District. In addition to the services set forth in the Scope of Services, the Consultant shall perform the following:

- A. Consultant shall secure at its own expense, all personnel, facilities, and equipment required to perform the services necessary to complete the Project.
- B. Consultant shall maintain an adequate and competent professional staff appropriately certified/licensed and operating within the State of Florida.
- C. Consultant shall designate in writing a single representative with whom the District shall coordinate Project work, which shall be the Project Manager listed in the proposal

incorporated into this Agreement pursuant to Section 7, unless otherwise revised in accordance with Section 2. This representative shall have the authority to transmit instructions, receive information, and interpret and deliver Consultant's policies, opinions, and decisions related to the Project.

- D. Consultant shall secure all licenses or permits required by law for the completion of the Scope of Services and shall be in compliance with all federal, state, and local law, statutes, rules, regulations, ordinances, orders, and decisions in effect at the time of the execution of the Agreement and during the time of performance of such services.
- E. Consultant shall, at all times, keep the District advised as to the status of the Project including, but not limited to, the progress on individual tasks within the Scope of Services. The District and its authorized representatives shall have the right to visit the office of Consultant at any reasonable time for purposes of inspection.
- F. Consultant shall cooperate with other consultants, contractors, or agents retained by the District as needed.
- G. The District shall have the right during the three (3) year period following the expiration or termination of the Agreement to audit Consultant with regard to any financial matters in connection with the services provided under this Agreement. The requested audit shall be performed by a certified public accountant selected and paid for by the District. Consultant shall make all documents and data available to the District or its designated auditor. Consultant may have the audit reviewed by Consultant's auditor at Consultant's expense.

SECTION 4. THE DISTRICT'S RESPONSIBILITY

Except as otherwise provided in the Scope of Services, the District's responsibilities are as follows:

- A. To designate the District's Fire Chief to act on the District's behalf with respect to all matters relating to the Project. The Fire Chief, or his designee, shall have complete authority to authorize changes to the Scope of Services; transmit instructions; receive information; approve the invoice and authorize payment thereon; and interpret and define District's policies and decisions with respect to materials, elements, subconsultants, key personnel, and systems pertinent to Consultant's services.
- B. To provide, within a reasonable time from request of Consultant: existing data, plans, reports, and other information in the District's possession or under the District's control

that are necessary or may be helpful to Consultant in performance of their duties, and to provide full information regarding requirements of the Project.

- C. To furnish required information and services and render approvals and decisions as expeditiously as necessary for the orderly progress of Consultant's services.

SECTION 5. TIME OF PERFORMANCE

Consultant recognizes that the District is required to have the Project completed in a timely manner to ensure compliance with the deadline established by Section 189.0695, Florida Statutes. Consultant shall commence providing services in the Scope of Services upon the Effective Date and shall satisfactorily complete such services within the established schedule.

SECTION 6. COMPENSATION

The District agrees to pay the Consultant \$[insert fee that was included in the Consultant's proposal] for services performed in the accordance with Part VII, Chapter 218, Florida Statutes (the Local Government Prompt Payment Act), upon receipt of a proper invoice and as follows:

- A. Final payment will be subject to successful completion of the Project in accordance with the terms of this Agreement.
- B. The fair and reasonable expenses of the Consultant necessarily incurred in the performance of the duties herein described and agreed to by the District shall, upon proper invoice and detail, be paid by the District, at actual cost with no mark-up. Expenses, which may be incurred by the Consultant for travel or hotels, must be pre-approved by the District's Fire Chief, or his or her designee and, if pre-approved, will be reimbursed in accordance with Exhibit C, District Per Diem Policy ("Per Diem Policy").
- C. Consultant shall prepare and submit to the District an invoice for the services rendered and expenses incurred upon completion of the Project. Payment shall be made in accordance with paragraph A from the date when it is stamped as received by the District unless payment is not approved by the Fire Chief pursuant to paragraph D.
- D. The District reserves the right to withhold payment to Consultant for failure to perform services in accordance with the provisions of the Agreement and the District shall promptly notify Consultant if the invoice is found to be unacceptable and will specify the reasons, therefore.

E. A dispute regarding the invoice shall be resolved pursuant to Section 218.76(2), Florida Statutes, as may be amended.

SECTION 7. AGREEMENT DOCUMENTS

The following documents are attached or incorporated herein by reference and made a part of this Agreement:

- A. Scope of Services, attached hereto as Exhibit A,
- B. Consultant's _____, 2022 Proposal submitted in response to the District's Request for Proposal – Independent Special Fire Control District Performance Review and any handouts and presentations delivered to the Selection Committee and Board of Fire Commissioners, attached hereto as Exhibit B,
- C. Per Diem Policy, attached hereto as Exhibit C,
- D. E-Verify Affidavit, attached hereto as Exhibit D,
- E. Certificate of Insurance, attached hereto as Exhibit E, and
- F. Any written amendments or addenda to the Agreement.

In the event of a conflict of contract terminology, priority shall first be given to the language in the body of this Agreement, then to Exhibit C, then to Exhibit A, as they may be amended.

SECTION 8. DOCUMENTS AND DATA

- A. Consultant will provide the District with the draft report, revised draft report(s), if applicable, final report, and other documents as identified in the Scope of Services at no additional cost to the District. In the case of additional requested copies, the supplemental cost for such deliverables will be negotiated on a case by case basis in advance of authorization to commence production. All original documents prepared by Consultant are instruments of service and shall become property of the District. The use of data gathered under the Agreement shall be restricted and limited to the purposes of the Agreement, excluding the data in the public domain, and shall not be used in connection with other contracts or for other clients of Consultant without written permission of the District. Consultant will provide the District with reproducible copies of all reports and other documents. Copies of electronic media used to store data shall be provided to the District in a format suitable for hard copy print out.
- B. The reports, documents, and working papers obtained or generated under the Agreement shall be maintained by Consultant and made available to the District upon request by the District at all times during the term of the Agreement and for five (5) years

thereafter. Consultant shall deliver to the District, at no cost, copies of such documents or reports.

- C. All reports, documents, and working papers prepared or obtained under the Agreement, shall become the property of the District without restriction or limitation of use, and shall be made available, upon request, to the District at any reasonable time. Consultant may retain copies thereof for their files and internal use. Any use by the District of such materials obtained under the Agreement for any purpose not related to the Project pursuant to the Agreement, or use of incomplete materials obtained from Consultant by the District shall be made at the risk of the District and made without liability to Consultant. However, this does not constitute a disclaimer of the professional competency of the original work as used within the Project.
- D. For a period of five (5) years after the completion of the Project, Consultant agrees to provide the District with copies of any additional materials in its possession resulting from the performance of the Scope of Services at no cost. However, this provision shall not be considered a waiver of any claim of attorney/client privilege to which Consultant is entitled.
- E. Consultant shall not publish, copyright, or patent any of the data furnished or developed pursuant to the Scope of Services without first obtaining the District's written consent.
- F. Consultant shall comply with the provisions of Chapter 119, Florida Statutes (Public Records Law). In addition to this Agreement's requirements and as required by Section 119.0701(2), Florida Statutes, the Consultant shall (1) keep and maintain public records that ordinarily and necessarily would be required by the District in order to perform the service; (2) provide the public with access to public records on the same terms and conditions that the District would provide the records and at a cost that does not exceed the cost provided by law; (3) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law; and (4) meet all requirements for retaining public records and transfer, at no cost to the District, all public records in possession of the Consultant upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records requirements. All records stored electronically must be provided to the District in a format that is compatible with the information technology systems of the District. Pursuant to Section 119.071(3)(b),

Florida Statutes, building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout and structural elements of a building, water treatment facility or other structure owned or operated by the District are exempt from the inspection, examination and duplication of public records provisions of Section 119.07(1), Florida Statutes, and Section 24(a), Article I of the State Constitution. Information made exempt by Section 119.071(3)(b), Florida Statutes, may only be disclosed to other governmental entities if disclosure is necessary for the receiving entity to perform its duties and responsibilities; to licensed architects, engineers, or contractors who are performing work on or related to the building or other structure; or upon a showing of good cause before a court of competent jurisdiction. Entities or persons receiving such information are required to maintain the exempt status of the information. Consultant agrees to include the above provision in all agreements with subconsultants that are related to the Consultant's performance under this Agreement, and to which the provisions of Chapter 119, Florida Statutes, also apply. Consultant shall also notify the District within forty-eight (48) hours of receipt of a public records request under Chapter 119, Florida Statutes.

G. IF THE CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT (850) 267-1298 or via email at rlund@swfd.org.

SECTION 9. STANDARD OF PERFORMANCE

Consultant shall perform and complete the Project in a timely manner and in accordance with the standard of care, skill, and diligence customarily provided by an experienced professional organization rendering the same services, and in accordance with sound principles and practices. The District shall decide all questions, difficulties, and disputes of any nature whatsoever that may arise under or by reason of the Agreement, the prosecution and fulfillment of the services called for hereunder, or the character, quality, amount, or value thereof. The decision of the District upon all such claims, questions, or disputes shall be reasonable and in adherence with sound principles and practices applicable to the professional services.

SECTION 10. CONSULTANT'S ACKNOWLEDGEMENTS AND REPRESENTATIONS

Consultant acknowledges and explicitly represents to the District the following:

- A. Consultant is duly authorized to conduct business in the State of Florida.
- B. In connection with the services to be performed under the Agreement, Consultant will abide by and assist the District in satisfying all applicable federal, state, and local laws, rules, regulations, and guidelines (including but not limited to the Americans with Disabilities Act) relative to performance under this Agreement. Consultant will not discriminate against any employee or applicant for employment because of race, color, religion, sex, handicap, disability, marital status, or national origin. Consultant will obtain and maintain all permits and licenses necessary for its performance under this Agreement.
- C. Consultant recognizes that:
 - 1. The performance of the services provided for within the Scope of Services may interface with work performed by others, and
 - 2. District may suffer penalties if the services are not completed within the time periods set forth in the Scope of Services, or any extensions thereof.
- D. Consultant has familiarized itself with the nature and extent of the Agreement, services expected to be performed under the Agreement, and federal, state, and local laws, statutes, rules, regulations, ordinances, orders, and decisions, which may affect Consultant's performance of the Agreement.
- E. Consultant has reviewed the Agreement (including its Exhibits) and all available information and data shown or indicated in the Agreement and has given the District written notice of all conflicts, errors, ambiguities, or discrepancies that it has discovered in the Agreement or information or data, and the written resolution thereof by the District is acceptable to Consultant.
- F. Consultant recognizes and acknowledges that the time for the performance of the services within the Scope of Services is of the essence.
- G. By signing this Agreement, Consultant certifies that it has at least five (5) years of experience conducting comparable reviews of organizations similar in size and function to the District and it does not have any affiliation with or financial involvement with the District.

SECTION 11. SUSPENSION OF PROJECT

- A. The District shall have the absolute right to terminate or suspend the Consultant's provision of any services, or amend the Scope of Services upon mutual agreement, at any time and for any reason upon reasonable notice, and such action on its part shall not be deemed a default or breach of the Agreement. Suspensions or termination of the Scope of Services by the District, and amendments to the Scope of Services, shall be in writing.
- B. In the event the provision of services is entirely or partly suspended, delayed, or otherwise hindered by any cause whatsoever, Consultant shall make no claims for additional compensation or damages owing to such suspensions, delays, or hindrances. Such suspensions, delays, or hindrances may only be compensated for by an extension of time, as the District may decide; however, such extension shall not operate as a waiver of any other rights of the District. Upon resumption of the provision of services, Consultant shall resume its service until the Project is completed, and the time for completion of the services, which were suspended, shall be extended for the duration of the suspension.
- C. If, in the opinion of the District, the progress of the Project during any period is substantially less than the amount that is necessary to meet the Project schedule, the District may require Consultant to take whatever action is necessary, in the opinion of the District, to put the Project back on schedule at no cost to the District.

SECTION 12. SUBCONSULTANTS

Consultant shall not subcontract, assign, or transfer the Agreement or any services specifically authorized in the Agreement without the prior written consent of the District, which consent may be withheld in the District's sole discretion, unless such subconsultant was identified as a key personnel in the Consultant's proposal. Consultant shall be solely responsible for the employment, direction, supervision, compensation, and control of any and all subconsultants or other persons employed by Consultant. Consultant shall cause all subconsultants or other persons employed by Consultant to abide by the terms and conditions of the Agreement and all applicable law as their services affect the District. Consultant shall not permit any subconsultant or other person or organization to perform services unless such subconsultant or other person or organization has complied with the workers' compensation insurance requirements contained in Section 14 herein. Nothing in

this Agreement shall be construed to create, or be implied to create, any relationship between the District and any subconsultant of the Consultant.

SECTION 13. INDEPENDENT CONTRACTOR

Neither the District nor any of its employees shall have any control over the conduct of Consultant or any of Consultant's employees, subconsultants, or agents, except as herein set forth, and Consultant expressly warrants not to represent at any time or in any manner that Consultant or Consultant's agents, subconsultants, or employees are in any manner agents, subconsultants, or employees of the District. It is understood and agreed that Consultant is and shall at all times remain as to the District, a wholly independent contractor and that Consultant's obligations to the District are solely as prescribed by the Agreement. Nothing contained in this Agreement will be deemed or construed by the parties or by any third person to create the relationship of principal and agent or of partnership or of joint venture or of any association between the District and the Consultant.

SECTION 14. INSURANCE

- A. The Consultant must maintain during the entire term of this Agreement, insurance in the following kinds and amounts with a company or companies authorized to do business in the State of Florida and shall not commence work under this Agreement until the District has received an acceptable certificate of insurance showing evidence of such coverage.
- B. The amounts and types of insurance shall be appropriate for the services being performed by the Consultant, its employees or agents and must conform to the following minimum requirements:
1. Workers Compensation. Coverage must apply for all employees and statutory limits in compliance with the applicable state and federal laws. In addition, the policy must include the following:
 - a. Employer's Liability with a minimum limit per accident in accordance with statutory requirements.
 - b. Notice of Cancellation and/or Restriction. The policy must be endorsed to provide District with thirty (30) days written notice of cancellation and/or restriction.
 2. Commercial or Comprehensive General Liability. Coverage must include:
 - a. \$1,000,000.00 combined limit per occurrence for bodily injury, personal injury and property damage.
 - b. Contractual coverage applicable to this specific contract, including any hold harmless and/or indemnification agreement, broad form property damage,

explosion, collapse, and underground hazard coverage and independent contractor's coverage.

- c. Additional Insured. District is to be specifically included as an additional insured.
- d. Notice of Cancellation and/or Restriction. The policy must be endorsed to provide District with thirty (30) days written notice of cancellation and/or restriction.

3. Comprehensive Automobile Liability. Coverage must be afforded on a form no more restricted than the latest edition of the Comprehensive Automobile Liability Policy filed by the Insurance Services Office and must include:

- a. \$1,000,000.00 combined single limit per accident for bodily injury and property damage.
- b. Owned Vehicle.
- c. Hired and Non-Owned Vehicles.
- d. Employee Non-Ownership.
- e. Additional Insured. District is to be specifically included as additional insured.
- f. Notice of Cancellation and/or Restriction. The policy must be endorsed to provide District with thirty (30) days written notice of cancellation and/or restriction.

4. Professional Liability. Coverage must include:

- a. Minimum limit of \$1,000,000.00 per occurrence or claim of malpractice, negligence, error and omissions.
- b. Minimum limit of \$1,000,000.00 in the aggregate for claims of malpractice, negligence, error and omissions.
- c. Notice of Cancellation and/or Restriction. The policy must be endorsed to provide District with thirty (30) days written notice of cancellation and/or restriction.

C. Consultant must deliver to the District Certificates of Insurance evidencing the insurance coverage specified in this Section 14 prior to commencing services under the Agreement. The required Certificates of Insurance not only shall name types of policies provided but also shall refer specifically to the Agreement.

D. Insurance coverage shall be placed with insurers or self-insurance funds, satisfactory to the District, licensed to do business in the State of Florida and with a resident agent designated for the service of process. Consultant shall provide the District with financial information concerning any self-insurance fund insuring Consultant. At the District's option, self-insurance fund financial information may be waived.

- E. All the policies of insurance so required of Consultant, except workers compensation and professional liability, shall be endorsed to include as additional insureds: the District, its commissioners, officers, employees, and agents. Such insurance policies shall include or be endorsed to include a cross-liability clause so the additional insureds will be treated as if a separate policy were in existence and issued to them. If the additional insureds have other insurance, which might be applicable to any loss, the insurance required of Consultant shall be considered primary, and all other insurance shall be considered excess. The cross-liability clause does not increase the limits of liability or aggregate limits of the policy.
- F. Deductible and self-insured retention amounts shall be subject to approval by the District, which approval shall not be unreasonably withheld. Consultant is responsible for the amount of any deductibles or self-insured retentions.
- G. Approval of the insurance by the District shall not relieve or decrease the liability of Consultant hereunder. Consultant acknowledges and agrees the District does not in any way represent the insurance (or the limits of insurance) specified in this Section 14 is sufficient or adequate to protect Consultant's interests or liabilities but are merely minimums.
- H. All of the policies of insurance required to be purchased and maintained (or the certificates or other evidence thereof) shall contain a provision or endorsement that the coverage afforded will not be cancelled, materially changed, or renewal refused, until at least thirty (30) days prior written notice has been given to the District and Consultant by certified mail. Consultant shall give notice to the District within twenty-four (24) hours of any oral or written notice of adverse change, non-renewal, or cancellation. If the initial insurance expires prior to completion of the work, renewal Certificates of Insurance shall be furnished thirty (30) days prior to the date of their expiration.
- I. All insurance required hereunder shall remain in full force and effect until final payment.
- J. Consultant shall, upon request by the District, deliver to the District a copy of each insurance policy purchased by Consultant.
- K. All policies, except for workers' compensation and professional liability, shall contain provisions to the effect that in the event of payment of any loss or damage the insurer will have no rights of subrogation against the District, its consultants, commissioners, officers, employees, or agents. Nothing contained in these insurance requirements is to

be construed as limiting the liability of Consultant or Consultant's insurance carriers.

- L. The commercial (occurrence form) or comprehensive general liability (occurrence form) insurance shall include contractual liability insurance applicable to all of the Consultant's obligations under the Agreement, including any indemnity or hold harmless provision.
- M. Consultant shall require each of its subconsultants and other persons or organizations working for Consultant to procure and maintain, until the completion of that party's services, insurance of the types and in the coverage amounts required to be carried by Consultant in the Agreement unless the District agrees, in writing, to other types of coverage and/or lower coverage amounts. Provided, however, professional liability insurance shall not be required under the Agreement for subconsultants or other persons or organizations working for Consultant, unless such party is a licensed professional. The preceding sentence does not preclude Consultant for requiring such insurance. Consultant shall be responsible for ensuring all of its subconsultants and other persons or organizations working for Consultant in connection with the Project comply with all of the insurance requirements contained herein relative to each such party. The Consultant must obtain Certificates of Insurance from any subconsultant otherwise the Consultant must provide evidence satisfactory to the District that coverage is afforded to the subconsultant or by the Consultant's insurance policies.

SECTION 15. INDEMNIFICATION OF THE DISTRICT

Consultant agrees to indemnify and hold harmless the District, and its commissioners, officers, and employees from liabilities, damages, losses, and costs, either at law or in equity, including but not limited to, reasonable attorney fees and costs and attorney fees and costs on appeal, as a result of any negligent or reckless act or omission or any intentional wrongful conduct of Consultant and other persons employed or utilized by the Consultant in performance of the Agreement. The execution of the Agreement by Consultant shall obligate Consultant to comply with the foregoing indemnification provision; however, the obligations of insuring this indemnification must also be complied with as set forth in Section 14 herein.

SECTION 16. TERM OF AGREEMENT

The term of this Agreement is for the duration of the Project or a period of nine (9) months from the Effective Date whichever comes first, unless terminated pursuant to the provisions of this Agreement.

SECTION 17. TERMINATION OF AGREEMENT BY THE DISTRICT/SURVIVAL

- A. The Agreement may be terminated by the District, with or without cause, upon ten (10) days written notice to the Consultant. Termination will be effective on the date provided in the notice. In the event of termination under this section, the Consultant shall be entitled to compensation for all services provided to the District up to the date of termination, which are within the Scope of Services, and are allowed under this Agreement. If the Agreement is so terminated, Consultant must promptly deliver to the District copies of all then completed deliverable items and other documents that directly support the deliverables prepared by Consultant.
- B. In the event the Agreement expires or should be terminated by the District or Consultant, the duties and obligations of Consultant under the following provisions shall survive termination and continue in full force and effect:
1. Section 3(G), regarding Audits;
 2. Section 8, regarding Documents and Data;
 3. Section 15, regarding Indemnification of the District;
 4. Section 17, regarding Termination of Agreement by the District/Survival;
 5. Section 18, regarding Default/Remedies;
 6. Section 21, regarding Truth-In-Negotiations/Public Entity Crimes Affidavit;
 7. Section 25, regarding Dispute Resolution; and
 8. Section 26, regarding Controlling Law/Attorney Fees.

SECTION 18. DEFAULT/REMEDIES

- A. Either party may terminate this Agreement upon the other party's failure to comply with any term or condition of this Agreement, as long as the terminating party is not in default of any term or condition of this Agreement at the time of termination. To effect termination, the terminating party shall provide the defaulting party with a written "Notice of Termination" stating its intent to terminate and describing all terms and conditions with which the defaulting party has failed to comply. If the defaulting party has not remedied its default within thirty (30) days after receiving the Notice of Termination, this Agreement shall automatically terminate. In addition, the initiation, either by Consultant or against Consultant, of proceedings in bankruptcy, or other proceedings for relief under any law for the relief of debtors, or Consultant becoming insolvent, admitting in writing its inability to pay its debts as they mature or making an assignment for the benefit of creditors shall constitute a default by Consultant entitling the District to terminate this Agreement as set forth above. The parties agree that this Agreement is an executory contract. If, after

termination by the District, it is determined that the Consultant was not in default, or that the default was excusable, the rights and obligations of the parties shall be the same as if the termination had been issued for the convenience of the District. The rights and remedies in this provision are in addition to any other rights and remedies provided by law or this Agreement.

- B. Unless specifically waived by the District, the Consultant's failure to timely comply with any obligation in this Agreement shall be deemed a breach of this Agreement and the expenses and costs incurred by the District, including attorney fees and costs and attorney fees and costs on appeal, due to said breach shall be borne by the Consultant. Additionally, the District shall not be limited by the above but may avail itself of any and all remedies under Florida law for any breach of this Agreement.
- C. A waiver, at any time, by the District of Consultant's breach of, or default in, any of the terms, provisions and obligations of this Agreement will not be construed to be a waiver of any other terms, provisions, and obligations hereof or a waiver of any breach or default other than specifically waived. The District's failure at any time to compel a fulfillment of any one or more of the terms, provisions or obligations under this Agreement will not be construed to be a waiver of District's right thereafter to enforce any such right. No waiver by the District will be deemed to have been made unless expressed in writing and signed by the District.

SECTION 19. SEVERABILITY

In the event any provision of the Agreement shall, for any reason, be held to be invalid, illegal or unenforceable in any respect, the parties hereto shall negotiate in good faith and agree to such amendments, modifications or supplements of the Agreement or such other appropriate actions as shall, to the maximum extent practicable in the light of such determination, implement and give effect to the intentions of the parties as reflected herein, and the other provisions of the Agreement, as amended, modified, supplemented or otherwise affected by such action, shall remain in full force and effect. If the parties cannot agree to such amendments, modifications or supplements to the Agreement, the remainder of the provisions in the Agreement will remain in full force and effect and will in no way be affected, impaired, or invalidated.

SECTION 20. PROHIBITION AGAINST CONTINGENCY FEES

Consultant warrants that it has not employed or retained any company or person, other than

a bona fide employee working solely for Consultant to solicit or secure this Agreement and that Consultant has not paid or agreed to pay any person, company, corporation, individual or Consultant, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, gift, or any other consideration contingent upon or resulting from the award or making of this Agreement. For the breach or violation of this provision, the District shall have the right to terminate the Agreement without liability, and at its discretion, to deduct from the contract price, or otherwise recover, the full amount of such fee, commission, percentage, gift or consideration.

SECTION 21. PUBLIC ENTITY CRIMES

Pursuant to Subsections 287.133(2) and (3), Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, Florida Statutes, for Category Two, for a period of thirty-six (36) months following the date of being placed on the convicted vendor list. By signing this Agreement, Consultant warrants that it is not currently on a suspended vendor list and that it has not been placed on a convicted vendor list in the past thirty-six (36) months. Consultant further agrees to notify the District if placement on either of these lists occurs within three (3) days of placement on either of these lists. Consultant agrees to include this provision in all subcontracts and require the Public Entity Crimes Statement Form for all subcontracts and lower tier agreements executed to support the Consultant's work under this Agreement.

SECTION 22. SUCCESSORS AND ASSIGNS

Except as otherwise provided in this Agreement, Consultant may not assign any of its rights or delegate any of its obligations under this Agreement without the prior written consent of the District.

SECTION 23. FORCE MAJEURE

Consultant is not responsible for damages or delay in performance caused by acts of God, strikes, lockouts, accidents, or other events beyond control of Consultant. In any such event, Consultant's contract price and schedule shall be equitably adjusted by the District.

SECTION 24. NO THIRD-PARTY BENEFICIARY

Nothing in this Agreement shall be construed to benefit any person or entity not a party to this Agreement.

SECTION 25. DISPUTE RESOLUTION

In the event any dispute or disagreement arises during the term of this Agreement, the Consultant shall fully perform the Scope of Services in accordance with the District's written instructions and may claim additional compensation. The Consultant is under a duty to seek clarification and resolution of any issue, discrepancy, or dispute by submitting a formal request for additional compensation, schedule adjustment or other proposed dispute resolution to the District's Fire Chief no later than ten (10) days after the precipitating event. The parties will use their best efforts to resolve amicably any dispute, including use of alternative dispute resolution options. No services shall be delayed or postponed pending resolution of any disputes or disagreements.

SECTION 26. CONTROLLING LAW/ATTORNEY FEE

- A. The Agreement is to be governed by the laws of the State of Florida. The sole and exclusive venue for any litigation resulting out of the Agreement shall be in Walton County, Florida, and if in federal court, shall be exclusively in the Northern District of Florida, Pensacola Division. Consultant hereby expressly waives any right it has to object to the venue of any action commenced in any courts in Walton County, Florida or the Northern District of Florida, Pensacola Division.
- B. Should either party employ an attorney or attorneys to enforce any of the provisions of this Agreement, or to protect its interest in any matter arising under this Agreement, or to recover damages for the breach of this Agreement, the party prevailing is entitled to receive from the other party all reasonable costs, charges, and expenses, including attorneys' fees, expert witness fees, fees, and costs on appeal, and the cost of paraprofessionals working under the supervision of an attorney, expended or incurred in connection therewith, whether resolved by out-of-court settlement, arbitration, pre-trial settlement, trial or appellate proceedings, to the extent permitted under Section 768.28, Florida Statutes. This paragraph does not constitute a waiver of the District's sovereign

immunity or extend the District's liability beyond the limits established in Section 768.28, Florida Statutes.

SECTION 27. CONFLICTING EMPLOYMENT

Consultant certifies that it does not at the time of execution of this Agreement have any retainer or employment agreement, oral or written, with any third party that directly conflicts with any interest or position of the District relating to the services provided by the Consultant under this Agreement. The Consultant further agrees that it shall not accept during the term of this Agreement any retainer or employment from a third party whose interests are in direct conflict with those of the District regarding the services being performed under this Agreement. In the event the Consultant is faced with an employment opportunity that appears to be a direct conflict with the services the Consultant is performing under this Agreement, the Consultant shall provide the District with notice of the employment opportunity. If the District determines that the employment would be a direct conflict with the services the Consultant is performing under this Agreement, the Consultant and the District shall have the opportunity to decide whether or not the Consultant will decline the employment opportunity or will accept the employment opportunity and terminate this Agreement.

SECTION 28. SCRUTINIZED COMPANIES

A. Pursuant to Section 287.135, Florida Statutes, a company that, at the time of bidding or submitting a proposal for a new contract or renewal of an existing contract, is on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, shall be ineligible for, and may not bid on, submit a proposal for, or enter into or renew a contract with an agency or local governmental entity for goods or services of any amount. By signing this Agreement, the Consultant certifies that it is not currently on the aforementioned list or is engaged in a boycott of Israel and agrees to notify the District if placement on the list or a boycott occurs. If Consultant submits a false certification, the District may terminate this Agreement and bring a civil action against the Consultant, which may result in a penalty equal to the greater of \$2 million or twice the fee for completion of the Scope of Services resulting from this Agreement and all reasonable attorney's fees and costs.

B. The Consultant shall continue to satisfy the conditions and requirements that it was required to satisfy to provide services on this Project throughout the term of this Agreement.

SECTION 29. CONFLICT OF INTEREST

This Agreement is subject to the provisions of Chapter 112, Part III, Florida Statutes, as amended, governing conflicts of interest. By execution of this Agreement, Consultant certifies that it has disclosed to the District the name of any officer, director, or agent who is also an employee of the District, and the name of any employee of the District who owns, directly or indirectly, an interest in the Consultant's company or any of its subsidiaries.

SECTION 30. NOTICES

Any notices or other writings permitted or required to be delivered under the provisions of the Agreement must be in writing and shall be delivered by sending the notice by personal delivery, U.S. certified mail return receipt requested, or overnight delivery in any event with sufficient postage affixed, and addressed as follows:

If to the District: Fire Chief/Administrator Ryan H. Crawford
911 North County Highway 393, Santa Rosa Beach, FL 32459

If to the Consultant: [insert Consultant name and address]

Either party may change said address by notice in writing to the other party in the manner herein provided.

SECTION 31. EXTENT OF AGREEMENT

The Agreement represents the entire and integrated agreement between the District and Consultant and supersedes all prior negotiations, representations, or agreement, either written or oral for services under a blanket agreement of this nature. This Agreement is not connected with nor affects separate agreement(s) arrived at through formal solicitation for professional services associated with large, dedicated capital improvement projects as may be awarded by the Board of Commissioners.

SECTION 32. PARTICIPATION IN E-VERIFY SYSTEM

Consultant and its subconsultants warrant compliance with all federal immigration laws and regulations that relate to their employees. Consultant agrees and acknowledges that the District is a public employer that is subject to the E-Verify requirements as set forth in Section 448.095, Florida Statutes, and that the provisions thereof apply to this Agreement.

Consultant by entering into this Agreement with the District, certifies: (i) it is registered with and uses the E-Verify system operated by the U.S. Department of Homeland Security to verify the work authorization status of all newly hired employees, (ii) during the year prior to making its submission or entering into this Agreement, no contract of Consultant was terminated by a public employer in compliance with Section 448.095, Florida Statutes, and (iii) Consultant is and shall remain in compliance with Sections 448.09 and 448.095, Florida Statutes, including securing and maintaining subconsultant affidavits as required by Section 448.095(2)(b), Florida Statutes. Additionally, Consultant shall require all subconsultants performing work under this Agreement to use the E-Verify system for any employees hired on and after January 1, 2021. Contractor must provide evidence to the District of compliance with Section 448.095, Florida Statutes, prior to entering into the Agreement and then annually on each anniversary of the Agreement's Effective Date. The District's receipt of proof that Consultant and each subconsultant performing through Consultant are E-Verify system participants is a condition precedent to entering this Agreement. The submission of an executed affidavit, similar to the affidavit in Exhibit D, from the Contractor and any subconsultants stating it is in compliance with Section 448.095, Florida Statutes, and all employees hired on and after January 1, 2021, have had their work authorization status verified through the E-Verify system shall satisfy this requirement. Notwithstanding the provisions of SECTION 17., TERMINATION OF AGREEMENT BY THE DISTRICT/SURVIVAL, or SECTION 18., DEFAULT/REMEDIES herein, if the District has a good faith belief that Consultant or its subconsultant/contractors have knowingly hired, recruited, or referred an alien who is not duly authorized to work by the immigration laws or the Attorney General of the United States for employment under this Agreement, the District shall terminate this Agreement. Consultant shall be liable for any additional costs incurred by the District as a result of the termination of this Agreement based on the failure of Consultant or its subconsultant/contractors to comply with the E-Verify requirements referenced herein.

SECTION 33. AMENDMENTS

This Agreement may be amended from time to time provided the District and the Consultant mutually agree to such amendment, and the amendment is stated in writing, executed by both parties; provided, however, that District may review and modify the terms and

EXHIBIT A
Consultant Scope of Services

The Project shall include the following services and deliverables:

Task 1: Project Kick Off

Completed no later than four (4) weeks of Effective Date

- Meet with the District's Fire Chief/Administrator and staff (as designated by the Fire Chief) to discuss the requirements of the performance audit.
- Obtain relevant materials needed from the District.

Task 2: Performance Review

Completed no later than twenty-six (26) weeks of Effective Date

- Perform a performance review, which is defined as an evaluation of the District and its programs, activities, and functions.
- Research and analyze the following:
 - The special district's purpose and goals as stated in its charter.
 - The special district's goals and objectives for each program and activity, the problem or need that the program or activity was designed to address, the expected benefits of each program and activity, and the performance measures and standards used by the special district to determine if the program or activity achieves the district's goals and objectives.
 - The delivery of services by the special district, including alternative methods of providing those services that would reduce costs and improve performance, including whether revisions to the organization or administration will improve the efficiency, effectiveness, or economical operation of the special district.
 - A comparison of similar services provided by the county and municipal governments located wholly or partially within the boundaries of the special district, including similarities and differences in services, relative costs and efficiencies, and possible service consolidations.
 - The revenues and costs of programs and activities of the special district, using data from the current year and the previous three (3) fiscal years.
 - The extent to which the special district's goals and objectives have been achieved, including whether the goals and objectives are clearly stated, measurable, adequately address the statutory purpose of the special district, provide sufficient direction for the district's programs and activities, and may be achieved within the district's adopted budget.
 - Any performance measures and standards of the special district's programs and activities using data from the current year and the previous three (3) fiscal years, including whether the performance measures and standards:
 - Are relevant, useful, and sufficient to evaluate the costs of the programs and activities.
 - Are being met.

- Should be revised.
- Factors that have contributed to any failure to meet the special district's performance measures and standards or achieve the district's goals and objectives, including a description of efforts taken by the special district to prevent such failure in the future.
- Recommendations for statutory or budgetary changes to improve the special district's program operations, reduce costs, or reduce duplication, including the potential benefits to be achieved and the potential adverse consequences of the proposed changes.

The analysis must be conducted in accordance with the applicable industry best practices (including but not limited to the National Fire Protection Association, Center for Public Safety Excellence, and the Insurance Services Office).

- Meetings with District Fire Chief and staff (as designated by the Fire Chief) as required and requested by the Consultant. At a minimum, the Consultant will meet with the District's Fire Chief/Administrator and staff at least twice as part of this task.
- Obtain any additional information, data, materials needed to complete the performance review.

Task 3: Draft Performance Review Report ("Draft Report")

Completed no later than thirty-four (34) weeks of Effective Date

- Develop a Draft Report of the analysis and review as provided for in Task 2, which shall include a separate section and analysis on each paragraph provided in Section 189.0695(1)(a)-(i), Florida Statutes.
- Submit the Draft Report to the District Fire Chief and staff (as designated by the Fire Chief).
- Schedule and hold a meeting with the District Fire Chief and staff (as designated by the Fire Chief) within one (1) week of Draft Report submission to discuss Draft Report, concerns, recommendations, etc. The purpose of the meeting is to provide a medium for discussing the Draft Report, including the results, conclusions, observations, and recommendations.
- Revise the Draft Report based on the above meeting and comments by District and submit a revised Draft Report. Revisions and additional Draft Report(s) are required to be made until approved by the Fire Chief.
- Incorporate District's comments submitted to the Consultant if received no more than two (2) weeks from submission of the Draft Report or a revised Draft Report(s) to the District, whichever is later. The Consultant shall include the District's comments in the Final Report, which shall be included in a separate section.

Task 4: Final Performance Review Report ("Final Report")

Completed no later than thirty-six (36) weeks of Effective Date

- Upon approval by the Fire Chief of the Draft Report, finalize and submit the Final Report to the District Fire Chief.

- Provide an electronic copy of the Final Report that must be ADA compliant, and five (5) printed and bound copies to the District. In addition, all relevant electronic files will be provided in their native format on a USB drive.
- If requested, Consultant will deliver a final presentation to the District's Board of Fire Commissioners.
- Submit the Final Report to the State Auditor, Florida Senate President, and Florida House of Representatives Speaker no later than seven (7) days from the presentation to the Board of Fire Commissioners, if requested, or submission of the Final Report to the District, whichever is later.

EXHIBIT B
Consultant Proposal

[insert proposal]

EXHIBIT C
Per Diem Policy

Consultant travel reimbursement will follow the guidelines below.

1. Pre-Approval – Any travel to be paid for by the District must be for valid District business and shall be pre-approved by the District's Fire Chief.

2. Transportation – Transportation must be at the most economical rate available for the appropriate mode of transportation. Mileage will be reimbursed at 44.5 cents per mile in accordance with Section 112.061, Florida Statutes.

3. Hotel - Hotel charges may be paid directly by the District at the option of the District. Incidentals such as room service, movie rentals, mini-bars, meals, etc. shall not be charged to nor reimbursed by the District.

4. Meals – Meals not paid directly by the District will be reimbursed at the lower of actual cost as evidenced by original receipts or \$9 for breakfast, \$14 for lunch and \$22 for dinner. Any meals that can be eaten at home before departure or after arrival back home from travel shall not be included for reimbursement.

5. Incidentals – The District does not pay for entertainment, alcohol, laundry, snacks, toiletries or any other incidental expenses incurred during business travel.

EXHIBIT D
CONSULTANT E-VERIFY
AFFIDAVIT

I hereby certify that _____ [insert
Consultant name] does not employ, contract with, or subcontract with an unauthorized alien,
and is otherwise in full compliance with Section 448.095, Florida Statutes.

All employees hired on or after January 1, 2021, have had their work authorization status
verified through the E-Verify system.

A true and correct copy of _____ [insert
Consultant name] proof of registration in the E-Verify system is attached to this Affidavit.

Print Name: _____

Date: _____

STATE OF _____

COUNTY OF _____

The foregoing instrument was acknowledged before me by means of physical presence
or online notarization, this _____ by _____ of _____
_____, a _____ company organized
under the laws of the State of _____, on behalf of the company, who is personally
known to me or has produced _____ as identification.

Notary Public
(Name Printed) _____

My commission expires _____.

(Printed typed or stamped Commissioned name of Notary Public)

SUBCONSULTANT E-VERIFY
AFFIDAVIT

I hereby certify that _____ [insert Subconsultant company name] does not employ, contract with, or subcontract with an unauthorized alien, and is otherwise in full compliance with, section 448.095, Florida Statutes.

All employees hired on or after January 1, 2021, have had their work authorization status verified through the E-Verify system.

A true and correct copy of _____ [insert Subconsultant company name] proof of registration in the E-Verify system is attached to this Affidavit.

Print Name: _____
Date: _____

STATE OF _____
COUNTY OF _____

The foregoing instrument was acknowledged before me by means of physical presence or online notarization, this _____ by _____ of _____, a _____ company organized under the laws of the State of _____, on behalf of the company, who is personally known to me or has produced _____ as identification.

Notary Public
(Name

Printed) _____
My commission expires _____.

(Printed typed or stamped Commissioned name of Notary Public)

EXHIBIT E
(certificate of insurance)