

## COUNCIL AGENDA STATEMENT



Meeting Date: December 10, 2024

To: Honorable Mayor & Members of the City Council

From: Dan Saus, Utilities Director

Through: George Garrett, City Manager

Agenda Item: **Resolution 2024-126**, Approving A Professional Services Agreement Between The City And Anser Advisory For Professional Services Related To The City's Annual Non-Ad Valorem Wastewater and Stormwater Special Assessment Programs, In An Amount Not To Exceed \$31,000 for Fiscal Year 2025-2026, Fiscal Year 2026-2027, and Fiscal Year 2027-2028 and \$16,000 for Fiscal Year 2028-2029; Authorizing The City Manager To Execute The Agreement And Expend Budgeted Funds On Behalf Of The City; And Providing For An Effective Date

---

### BACKGROUND & JUSTIFICATION:

Anser Advisory, formerly Government Services Group, Inc. (GSG), has provided the services required to annually update the City's non-ad valorem special assessments since 2008. The attached proposal will provide similar services for Fiscal Years 2025-26 through 2028-29 as in the past which include all payment and owner update preparations required for the annual assessment rolls, recalculating payment data, and transferring the data file to the tax collector's office for Stormwater and Wastewater non-ad valorem assessment programs.

### CONSISTENCY CHECKLIST:

	<u>YES</u>	<u>NO</u>
1. Comprehensive Plan	<u>X</u>	
2. Other (2010 State Mandate)	<u>X</u>	

### FISCAL NOTE:

Funding for FY25 (Fiscal year 25-26 assessment roll prep) is included in the adopted utilities budgets. Approval will require the appropriation of funds in the future fiscal year utilities budgets.

### RECOMMENDATION:

Approval of Resolution.

Sponsored by: Garrett

**CITY OF MARATHON, FLORIDA  
RESOLUTION 2024-126**

**A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF MARATHON, FLORIDA APPROVING A PROFESSIONAL SERVICES AGREEMENT BETWEEN THE CITY AND ANSER ADVISORY FOR PROFESSIONAL SERVICES RELATED TO THE CITY'S ANNUAL NON-AD VALOREM WASTEWATER AND STORMWATER SPECIAL ASSESSMENT PROGRAMS IN AN AMOUNT NOT TO EXCEED \$31,000 FOR FISCAL YEAR 2025-2026, FISCAL YEAR 2026-2027, FISCAL YEAR 2027-2028; AND \$16,000 FOR FISCAL YEAR 2028-2029; AUTHORIZING THE CITY MANAGER TO EXECUTE THE AGREEMENT AND EXPEND BUDGETED FUNDS ON BEHALF OF THE CITY; AND PROVIDING FOR AN EFFECTIVE DATE**

**WHEREAS**, the City of Marathon, Florida (the "City") has established an annual non-ad valorem special assessment to fund stormwater management, and road and wastewater improvements on an on-going basis; and

**WHEREAS**, the City desires to engage the professional services of Anser Advisory to assist with the statutorily-required annual update of the City's non-ad valorem wastewater and stormwater special assessment programs for Fiscal Years 2025-26 through 2028-29.

**NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF MARATHON, FLORIDA, THAT:**

**Section 1.** The above recitals are true and correct and incorporated herein.

**Section 2.** The agreement between the City and Anser Advisory for professional services in the amount of \$31,000.00 for Fiscal Year 2025-2026, Fiscal Year 2026-2027, Fiscal Year 2027-2028; and \$16,000 for Fiscal Year 2028-2029 (plus first class mailing and travel, if needed), a copy of which is attached as Exhibit "A," together with such non-material changes as may be acceptable to the City Manager and approved as to form by the City Attorney, is hereby approved. The City Manager is authorized to execute the agreement on behalf of the City and expend budgeted funds.

**Section 3.** This resolution shall take effect immediately upon its adoption.

**PASSED AND APPROVED BY THE CITY COUNCIL OF THE CITY OF  
MARATHON, FLORIDA, THIS 10<sup>th</sup> DAY OF DECEMBER 2024.**

**THE CITY OF MARATHON, FLORIDA**

---

**Mayor Lynn Landry**

AYES:  
NOES:  
ABSENT:  
ABSTAIN:

**ATTEST:**

---

Diane Clavier, City Clerk

(City Seal)

**APPROVED AS TO FORM AND LEGAL SUFFICIENCY FOR THE USE  
AND RELIANCE OF THE CITY OF MARATHON, FLORIDA ONLY:**

---

Steve Williams, City Attorney



October 18, 2024

**Via Electronic Mail**

Mr. Dan Saus  
Utilities Director  
9805 Overseas Highway  
Marathon, FL 33050

**Re: City of Marathon Wastewater Assessment Programs – Proposal for 4-Year Continuing Services Contract (Fiscal Years 25-26 through 2028-29)**

Dear Mr. Saus,

This correspondence is written to present a scope of services for Anser Advisory Consulting, LLC (“Anser”), to provide professional services and specialized assistance to the City of Marathon (“City”) and its staff with ongoing maintenance of the following assessment programs:

1. Wastewater assessment program for Service Areas 4 & 6 (ends FY 2027-28)
2. Wastewater assessment program for Service Areas 1, 2, 3, 5 & 7 (ends FY 2028-29)
3. Wastewater assessment program – Supplemental (ends FY 2028-29)

Attached as Appendix A is a proposed Scope of Services which articulates the professional services and specialized assistance required by Anser to assist the City with the annual maintenance of the three aforementioned wastewater assessment programs for Fiscal Years 2025-26 through 2028-29. Also included as part of Appendix A is a list of annual project deliverables, delivery schedule, project fees, and payment schedule.

Upon review and satisfactory determination, please sign where indicated to acknowledge acceptance of the attached proposal and to serve as proper Notice to Proceed. Upon execution, please provide our office with a signed copy for our files.

If you have any questions or need additional information, please feel free to contact me. We look forward to working with the City again.

Sincerely,

Sandi Neubarth  
Director  
[Sandi.Neubarth@anseradvisory.com](mailto:Sandi.Neubarth@anseradvisory.com)

# Appendix A

SCOPE OF SERVICES  
ANNUAL WASTEWATER ASSESSMENT PROGRAMS FOR:  
1. SERVICE AREAS 4 & 6  
2. SERVICE AREAS 1, 2, 3, 5 & 7  
3. SUPPLEMENTAL PROGRAM  
FISCAL YEARS 2025-26 THROUGH 2028-29

# Scope of Services

- Task 1: Provide Base Retainer Services for Current Fiscal Year Assessment Programs** Upon notice to proceed, Anser will be retained to administer the current fiscal year assessment programs and maintain the assessment rolls database. Such retainer services will include Anser's availability to respond to requests for information or assistance from City staff regarding all aspects of the current assessment programs. In addition, Anser will prepare the critical events schedule for the upcoming fiscal year to ensure adherence to the statutory deadlines and will maintain the current fiscal year database in a manner that ensures data availability to specific requests.
- Task 2: Prepare Annual Assessment Rolls** Update the assessment rolls from the previous fiscal year for use in the recurring annual assessment programs by obtaining new ad valorem tax roll information from the Monroe County Property Appraiser's Office, identifying changes to parcels (i.e., splits, combinations and subdivisions) and applying payoff information. Anser will work with City staff as needed to process the database revisions which are generated.
- Task 3: Calculate Annual Assessment Amounts** Calculate/confirm the annual assessment amounts, at the parcel level, based on the apportionment methodology and debt service for the assessment programs for the upcoming fiscal year.
- Task 4: Assist in Preparation of Annual Resolutions** Assist the City's legal counsel in the preparation of annual assessment resolutions which conform to the related assessment ordinances.
- Task 5: Certify the Annual Assessment Rolls** If necessary, advise and assist with the legal requirements for the adoption of the final assessment rate resolutions in accordance with Section 197.3632, Florida Statutes, including the certification of the assessment roll to the Monroe County Tax Collector.
- Task 6: Export Assessment Rolls** Export the upcoming fiscal year assessment rolls to the Monroe County Tax Collector.
- Task 7: Compute Prepayment Amounts** Upon delivery of the assessment rolls compute the prepayment amounts for the upcoming fiscal year and prepare prepayment rolls.

## FEES AND COSTS

For the professional services and specialized assistance provided by Anser, we will work under a professional fee arrangement as described in the attached scope of services and as illustrated in the following table:

Assessment Program	Annual Fee (FY 2025-26 – FY 2028-29)
Wastewater Assessment - Service Areas 4 & 6 – Program ends FY 2027-28	\$15,000
Wastewater Assessment - Service Areas 1, 2, 3, 5 & 7	\$15,000
Wastewater Assessment - Supplemental	\$1,000

For the services provided by Anser, as outlined in the Scope of Services, we will work under a professional fee arrangement of \$31,000 for Fiscal Years 2025-26 through 2027-28 and \$16,000 for Fiscal Year 2028-29. This annual fee includes reimbursement for all out-of-pocket expenses, except as noted below.

The fee for professional services does not include any on-site visits by Anser staff to the City. If necessary, on-site meetings may be arranged at a flat negotiated fee or at our standard hourly rates provided below. All expenses related to requested meetings will be billed in accordance with section 112.061, Florida Statutes. If necessary, in lieu of on-site visits, periodic telephone conference calls may be scheduled to discuss project status.

The standard hourly rates for Anser are as follows:

**ANSER ADVISORY CONSULTING, LLC**

Senior Advisor .....	\$285
Vice President/Managing Director .....	\$285
Director/Senior Program Manager .....	\$235
Project Manager/Project Coordinator .....	\$185
Senior Data Analyst .....	\$185
Database Analyst/Technical Services .....	\$150
Lead Project Analyst .....	\$100
Project Analyst .....	\$ 90
Administrative Support .....	\$ 75

The lump sum fee does not include the costs of producing and mailing first class notices, if required. Mailing and production costs depend on the number of assessable parcels of property within the assessment program area, but average approximately \$1.63 per parcel. Payment of mailing and production costs is due at the time of adoption of the initial assessment resolution or like document. For non-domestic notices, mailing charges will include the actual amount of postage beyond the domestic rate. Should U.S. postage rates increase prior to mailing, the additional postage per notice will be charged.

The City is responsible for any costs incurred to obtain information from the property appraiser or other public officials that is necessary for the assessment program.

The City is responsible for working with the Property Appraiser to obtain the necessary information for properties with exempt "home addresses" pursuant to Section 119.071, Florida Statutes.

The City is responsible for any and all newspaper publications, including, but not limited to, making arrangements for publications and any costs associated therewith.

Please note that Anser works with the premise of developing and implementing assessment programs with an eye on potential legal challenges in an attempt to maximize both the efficiency and the effectiveness of any defense. Nonetheless, the fees outlined above for professional services do not include any provision for litigation defense. Accordingly, in the event there is a legal challenge, Anser would be available, on an hourly basis, to assist the City in its defense.

## **PRELIMINARY SCHEDULE OF PROJECT DELIVERABLES FY 2025-26 THROUGH FY 2028-29**

<b>Project Deliverable</b>	<b>Date</b>
Notice to Proceed	By November 30 <sup>th</sup>
Annual Maintenance of Assessment Rolls Database	Periodically throughout the year
Critical Events Schedule	January – March
Prepare Preliminary Assessment Rolls	April - May
Provide Direction on Annual Assessment Rates	May - June
City Publishes Notice	June – July
Provide Comments on Drafted Assessment Resolution(s)	July
Public Hearing	July
Prepayment Period Ends	August 31 <sup>st</sup>
Develop Final Assessment Rolls	September
Export & Transmit Final Assessment Rolls to Tax Collector	By September 15 <sup>th</sup>
Certify Assessment Rolls to Tax Collector	By September 15 <sup>th</sup>
Compute Prepayment Amounts	September – October



## PAYMENT SCHEDULE

The fee for professional services for fiscal years 2025-26 through 2028-29 will be due and payable based on the following schedule.

FY 2025-26		
Percentage of Annual Payment	Payment Date	Amount Due
25% of annual fee	January 2025	\$7,750
25% of annual fee	March 2025	\$7,750
25% of annual fee	June 2025	\$7,750
25% of annual fee	August 2025	\$7,750
<b>Total</b>		<b>\$31,000</b>

FY 2026-27		
Percentage of Annual Payment	Payment Date	Amount Due
25% of annual fee	January 2026	\$7,750
25% of annual fee	March 2026	\$7,750
25% of annual fee	June 2026	\$7,750
25% of annual fee	August 2026	\$7,750
<b>Total</b>		<b>\$31,000</b>

FY 2027-28		
Percentage of Annual Payment	Payment Date	Amount Due
25% of annual fee	January 2027	\$7,750
25% of annual fee	March 2027	\$7,750
25% of annual fee	June 2027	\$7,750
25% of annual fee	August 2027	\$7,750
<b>Total</b>		<b>\$31,000</b>

FY 2028-29		
Percentage of Annual Payment	Payment Date	Amount Due
25% of annual fee	January 2028	\$4,000
25% of annual fee	March 2028	\$4,000
25% of annual fee	June 2028	\$4,000
25% of annual fee	August 2028	\$4,000
<b>Total</b>		<b>\$16,000</b>

**ACCEPTED AND AGREED TO FOR MARATHON WASTEWATER SPECIAL ASSESSMENT PROGRAMS FISCAL YEARS 2025-26 THROUGH 2028-29:**

BY: \_\_\_\_\_ DATE \_\_\_\_\_  
CITY OF MARATHON