

Addendum No. 1

Benefit Assessment and Parcel Tax Engineering Services

RFP-2024-07

To: Request for Bids Recipients
From: Santa Clara Valley Open Space Authority
Date: July 3, 2024
Re: Addendum 1

Addenda No. 1 consists of:

Santa Clara Valley Open Space Authority has received the following questions in response to its Request for Proposals (RFP) for Benefit Assessment and Parcel Tax Engineering Services. Responses to these questions are being provided publicly to all possible candidates.

1	Is the Authority satisfied with the current administrator's services? Yes
2	What other services could be helpful to the Authority? None at this time.
3	Can the Authority provide the current consultant's contract and rates for specified scope of work services? Fee schedule is attached.

EXHIBIT B

PROPOSED FEE SCHEDULE FOR BENEFIT ASSESSMENT ADMINISTRATION SERVICES

SCI shall be compensated for the performance of the Scope of Work for Benefit Assessment Administration Services as follows:

1. For Fiscal Year 2020-21, the total compensation for the Scope of Work shall be \$16,000 payable as follows:
 - a. Upon submittal of the special assessment levies to the County Auditor, the sum of \$8,000 shall be due.
 - b. On January 31 of the fiscal year, the remainder shall be due.
2. For Fiscal Year 2021-22, the total compensation for the Scope of Work shall be \$16,640 payable as follows:
 - a. Upon submittal of the special assessment levies to the County Auditor, the sum of 8,640 shall be due.
 - b. On January 31 of the fiscal year, the remainder shall be due.
3. For Fiscal Year 2022-23, the total compensation for the Scope of Work shall be \$17,305 payable as follows:
 - a. Upon submittal of the special assessment levies to the County Auditor, the sum of \$8,800 shall be due.
 - b. On January 31 of the fiscal year, the remainder shall be due.
4. For Fiscal Year 2023-24, the total compensation for the Scope of Work shall be \$18,000 payable as follows:
 - a. Upon submittal of the special assessment levies to the County Auditor, the sum of \$9,000 shall be due.
 - b. On January 31 of the fiscal year, the remainder shall be due.
5. For Fiscal Year 2024-25, the total compensation for the Scope of Work shall be \$18,000 payable as follows:
 - a. Upon submittal of the special assessment levies to the County Auditor, the sum of \$9,000 shall be due.
 - b. On January 31 of the fiscal year, the remainder shall be due.
6. In the event that the Authority elects to request optional, additive scope of work, SCI will work with the Authority to negotiate compensation for these additional tasks, and to execute an Addendum to the agreement of these additional services.
7. If the Authority desires to extend the term of this agreement, the fee amount for each additional year will be the amount of the last fiscal year shown above, increased annually by 3%.
8. Incidental costs incurred by SCI for the purchase of property data, maps, publishing the public hearing notice, travel and other out-of-pocket expenses incurred in performing the Scope of Work shall be reimbursed at actual cost by the Authority with total cost not to exceed \$6,000 per year, without prior authorization from the Authority. It should be noted that most of these incidental expenses are for publishing of the notice (approximately \$3,100) and purchasing assessor data (approximately \$1,500).

Note: All costs associated with benefit assessment administration services can be financed or refunded by assessment proceeds.

PROPOSED FEE SCHEDULE FOR SPECIAL TAX ADMINISTRATION SERVICES

SCI shall be compensated for the performance of the Scope of Work for Special Tax Administration Services as follows:

1. For Fiscal Year 2020-21, the total compensation for the Scope of Work shall be \$8,000 payable as follows:
 - a. Upon submittal of the special tax levies to the County Auditor, the sum of \$4,000 shall be due.
 - b. On January 31 of the fiscal year, the remainder shall be due.
2. For Fiscal Year 2021-22, the total compensation for the Scope of Work shall be \$8,320 payable as follows:
 - a. Upon submittal of the special tax levies to the County Auditor, the sum of \$4,320 shall be due.
 - b. On January 31 of the fiscal year, the remainder shall be due.
3. For Fiscal Year 2022-23, the total compensation for the Scope of Work shall be \$8,655 payable as follows:
 - a. Upon submittal of the special tax levies to the County Auditor, the sum of \$4,655 shall be due.
 - b. On January 31 of the fiscal year, the remainder shall be due.
4. For Fiscal Year 2023-24, the total compensation for the Scope of Work shall be \$9,000 payable as follows:
 - a. Upon submittal of the special tax levies to the County Auditor, the sum of \$5,000 shall be due.
 - b. On January 31 of the fiscal year, the remainder shall be due.
5. For Fiscal Year 2024-25, the total compensation for the Scope of Work shall be \$9,000 payable as follows:
 - c. Upon submittal of the special tax levies to the County Auditor, the sum of \$5,000 shall be due.
 - d. On January 31 of the fiscal year, the remainder shall be due.
6. In the event that the Authority elects to request optional, additive scope of work, SCI will work with the Authority to negotiate compensation for these additional tasks, and execute an Addendum to the agreement of these additional services.
7. If the Authority desires to extend the term of this agreement, the fee amount for each additional year will be the amount of the last fiscal year shown above, increased annually by 3%.
8. Incidental costs incurred by SCI for the purchase of property data, maps, travel and other out-of-pocket expenses incurred in performing the Scope of Work shall be reimbursed at actual cost by the Authority with total cost not to exceed \$200 per year, without prior authorization from the Authority.

Note: All costs associated with special tax administration services can be financed or refunded by the special tax proceeds.