



Response to RFP for:
**Independent Special Fire Control District
Performance Review**

West Manatee Fire & Rescue District



Prepared by:

BJM CPA, Inc.
1956 Bayshore Boulevard
Dunedin, FL 34698

June 2, 2022



1965 Bayshore Boulevard | Dunedin, FL 34698 | 727-205-8150 | info@bjmgroup.com

June 2, 2022

West Manatee Fire & Rescue District
Attention: Commissioner Robert Bennett
701 63rd Street West
Bradenton, FL 34209

Dear Commissioner Bennett,

BJM CPA, Inc. is pleased to submit this proposal for an independent Special Fire Control District Performance Review for the West Manatee Fire & Rescue District (District). We understand the importance of this project and appreciate you considering the use of BJM CPA services.

BJM CPA has considerable and demonstrated knowledge and understanding of fire service and EMS organizations and the complexity of service delivery systems associated with each. Through experience with multiple fire and EMS agencies, we understand the unique challenges that you face, not only as a fire and EMS provider but also as a Special District.

BJM CPA has assigned a highly qualified team of CPAs and former Florida fire chiefs. The team members have experience with emergency service master planning, strategic planning, fiscal analysis, incident analysis, cooperative services analysis, EMS delivery, staffing assessments, and benchmarking.

Our scope of work covers all stated requests and requirements. The tasks defined in the scope will evaluate current conditions, with ultimate delivery of a Final Performance Review Report. We are committed to perform the work within the time proposed.

Our proposed fee for this project is \$57,500, all expenses included.

We appreciate your consideration of BJM CPA services—we look forward to working with the West Manatee Fire & Rescue District in this important endeavor. Should you have any questions, please contact me at rcristini@bjmgroup.com or by phone at 727-487-3883.

Sincerely,

Richard Cristini, CPA, CGFM, CPPT
Project Manager
BJM CPA, Inc.

Neal Bach, CPA
CEO
BJM CPA, Inc.



Scope of Services

The Independent Special Fire Control District Performance Review (Project) will include the following services and deliverables. BJM CPA, Inc. (BJM) plans to complete the Project in 12 weeks. Please note that timeframes and completion dates assume all District deliverables are received on or before agreed-upon due dates, regardless of the source, and all meetings occur on-schedule. BJM suggests meetings be held virtually to improve efficiency and control costs.

Task 1: Project Kick Off

Completed no later than 1 week after Effective Date

- Meet with the District Fire Chief and staff (as designated by the Fire Chief) to discuss the requirements of the performance audit.
- Obtain relevant materials needed from the District. BJM will provide a detailed list.

Task 2: Performance Review

Completed no later than 5 weeks after 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.

BJM will conduct this analysis 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) may be required or requested by BJM. At a minimum, BJM will meet with the District Fire Chief and staff at least twice as part of this task.
- BJM will obtain any additional information, data, materials needed to complete the performance review.

Task 3: Draft Performance Review Report (“Draft Report”)

Completed no later than 9 weeks after 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 BJM 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. BJM will 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 **12** weeks after 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, BJM will deliver a final presentation to the District's Board of Fire Commissioners.
- Submit the Final Report to the State Auditor General, 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.

Proposal Requirements

BJM CPA, Inc. is pleased to submit this proposal for an independent Special Fire Control District Performance Review for the West Manatee Fire & Rescue District (District). All requested information has been included in the section below as well as in related attachments.

1. Legal name, address, phone number and email of Consultant

BJM CPA, Inc.
1956 Bayshore Boulevard
Dunedin, FL 34698
Office: 727-734-5437

Primary Contact: Richard Cristini, CPA, CGFM, CPPT
Email: rcristini@bjmgroup.com
Cell: 727-487-3883

2. Principal office locations of submitting Consultant and any proposed partners/subconsultants

BJM CPA, Inc.
1956 Bayshore Boulevard
Dunedin, FL 34698

J. Angle Group, LLC (subconsultant)
3025 SE Maricamp Rd #104 PMB #148
Ocala, Florida 34471

3. Legal form of company, i.e., partnership, corporation, joint venture, (if joint venture, identify the members)

BJM CPA, Inc. is a C-corp.

4. Briefly state understanding of the Project and provide a positive commitment to perform the work

BJM CPA, Inc. (BJM) recognizes that the District desires to retain a qualified and experienced consulting firm with the goal of providing the district with a performance review of the district in accordance with Section 189.0695, Florida Statutes, which will be memorialized within a formal report ("Project"). BJM has developed this proposal consistent with the District's Request for Proposals and is proposing to performance a review the district and

prepare a final report. The review and final report will include 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 will 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). BJM will also follow GAO performance review standards, found in The Generally Accepted Government Auditing Standards (GAGAS), commonly referred to as the "Yellow Book."

BJM is committed to successfully complete this project and the deliverables within the time period proposed and in a manner that will meet or exceed your expectations.

5. Describe approach to the Project and proposed timeline

It is a privilege for the BJM CPA, Inc. to provide this description and proposed timeline in response to this RFP. This project will examine the current conditions at the District by performing a comprehensive analysis of the District's operations and the type and level of services provided to the citizens and visitors of the district. In order to complete the performance review process and report, several tasks will need to be completed.

The BJM team will develop a project work plan based on this scope of work and will hold a kick-off meeting with the District's project team to gain a comprehensive understanding of the organization's background, goals, and expectations for this project. During this time, logistical arrangements, lines of communication, and contractual arrangements will be finalized.

The next step will be a request from BJM to the District for information and data pertinent to the project, followed by interviews (as needed) of key stakeholders. The BJM team may interview stakeholders of outside organizations associated with this study, as identified.

The analysis begins with a baseline assessment and current service performance of the organization. BJM will conduct a performance review of the District based on our understanding of the project as described above. The purpose of this assessment is to evaluate the agency's operations in comparison to industry standards and best practices, as well as to create a benchmark against which future improvements can be measured.

BJM will develop and produce an electronic version of the draft report for review by the district staff. Feedback is a critical part of this project; adequate opportunity will be provided for review and discussion of the draft report prior to finalization.

Once finalized, five printed and bound copies of the report will be provided, as well as an ADA complaint electronic copy on a USB drive. All relevant electronic files will be provided in their native format on a USB drive.

A formal presentation of the project report will be made by BJM to member(s) of the District staff, elected officials, and/or others as agreed upon. BJM will submit the Final Report to the State Auditor General, 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.

Tasks and Timeline

The Project should take 12 weeks from kickoff to Final Performance Review Report presentation, assuming that the District can meet with BJM and provide data as requested. Below are the major milestones and details work to be done.

- Project Kick Off – Completed no later than 1 week of Effective Date.
 - Meetings with District Fire Chief and Key Staff
 - Development of Project Work Plan
 - Data Request
 - Collection and review of background Information and obtain relevant data and materials. This may include, but not be limited to, district creation documents, current service delivery and performance data, program goals and objectives, past (at least three years) and current financial data, staffing plans, capital equipment and facilities plans.
- Performance Review - Completed no later than 4 weeks from completion of the project kickoff data and information requests.
 - Research and analysis
 - Service delivery
 - Service comparison
 - Revenue and expenses
 - Performance measures, standards, and gaps
 - Factors for success or failure
- Create draft Performance Review Report - Completed no later than 8 weeks from completion of the project kickoff data and information requests.
 - Recommendations
 - Review and revise – based on follow-up meetings with District Fire Chief and staff
- Present the Final Performance Review Report – BJM will be available to present no later than 3 weeks from completion of the draft Performance Review Report acceptance.

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

All BJM team members have extensive experience in emergency service master planning, strategic planning, fiscal analysis, incident analysis, cooperative services analysis, EMS delivery, agency and staffing assessments, and local government legislative, administrative, and political interaction.

The BJM performance review team collectively possesses the competence needed to address the engagement objectives and perform their work in accordance with COSO standards. BJM has a process for recruitment, hiring, continuous development, assignment, and evaluation of personnel so that the workforce has the essential knowledge, skills, and abilities necessary to conduct the engagement. The nature, extent, and formality of the

process will depend on various factors, such as the size of the district, its structure, and its work.

BJM has sufficient staff, supervisors, and specialists with adequate collective professional competence, and other resources are available to conduct the review and to meet expected timeframes for completing the work. BJM will use technology to hold meetings virtually when practical to improve efficiency and contain travel cost.

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.

Project Manager: Richard A. Cristini, CPA, CGFM, CPPT

Richard is an auditor with 40 years of experience in management and the public accounting profession. His areas of expertise include auditing, accounting, and strategic planning for governmental and not-for-profit organizations.

In addition, Richard has performed peer reviews (as team captain) under the Peer Review Program of the American Institute of Certified Public Accountants. He has served for many years on the Florida Institute of Certified Public Accountants’ Peer Review Committee.

A graduate of John Carroll University, Richard is a Certified Public Accountant in the States of Florida and Ohio, and a Certified Government Finance Manager. He is a Continuing Professional Education Instructor for the American Institute of Certified Public Accountants. Richard has frequently served on various subcommittees to promulgate accounting standards including several Governmental Accounting Standards Board task forces. He has served for 20 years on the Government Finance Officers Special Review Committee.

On June 18, 2021 the Florida Board of Accountancy appointed Richard as a member of the Peer Review Oversight Committee (PROC) for a term of five years.

Comparable experience: Richard has been the reviewer for the EMS reports for three independent fire districts as mandated by the Pinellas County Emergency Medical Services Authority. He has completed local government performance reviews for the City of West Palm Beach, FL and the Town of Belleair, FL. Richard has also completed the performance reviews for the parishes within the St. Petersburg Diocese.

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

Jeanine Bittinger, CPA

Jeanine is an auditor who specializes in governmental, pension plans, and compliance auditing. She has also done performance reviews for governments, churches, and not-for-profit entities.

Jeanine's experience includes 30 years in the public accounting profession. She has performed and developed audit programs for operational and regulatory compliance audits and facilitated strategic plans for several local governments and not-for-profit organizations.

A graduate of the University of South Florida, Jeanine has a B.S.B.A. with a major in accounting. She completed the Advanced Program from Southwest School of Government Finance (sponsored by Texas Tech University).

Jeanine is a Certified Public Accountant in the State of Florida. She is a member of the American Institute of Certified Public Accountants, the Florida Institute of Certified Public Accountants, and the Florida Government Finance Association. Jeanine has been an active member with the Florida Government Finance Officers Association Conference Committee, the GFOA's Special Review Committee (the sponsor of the Certificate of Achievement for Excellence in Financial Reporting Program), and the Florida Institute of Certified Public Accountants (FICPA), State and Local Government Sections. Jeanine has served as a representative of the FICPA on the Auditor Selection Task Force, which was organized by the Auditor General's Office to study the auditor selection process.

Comparable experience: Jeanine has been in charge of EMS reports for three independent fire districts as mandated by Pinellas County Emergency Medical Services Authority. She has completed local government performance reviews for the City of West Palm Beach, FL and the Town of Belleair, FL. She also completed the performance reviews for the parishes within the St. Petersburg Diocese.

James Angle, Senior Consultant

Jim has extensive, proven experience in data collection and analysis, evaluation of processes, planning skills, and presentation skills. He has specific experience and expertise related to the governance and operation of special fire districts and the legislative background and operation of independent special districts in general.

Jim is an expert at publishing and data analysis, research and evaluation of applicable standards, and regulations and best practices as they apply to organizational programs. His critical thinking and demonstrated problem-solving skills offer clients realistic and proven strategies that are easily accepted by elected officials and supported by the public.

Professional Experience

- Former Fire Commissioner, Palm Harbor Special Fire Control and Rescue District

- Program Director (Ret.), St. Petersburg College, Fire and Public Safety Training Center
- Fire Chief (Ret.), Palm Harbor Special Fire Control and Rescue District
- Battalion Fire Chief, South Trail Special Fire Control and Rescue District
- Fire Department Training/Safety Officer, South Trail Special Fire Control and Rescue District

Educational Background

- Master of Business Administration, Nova University
- Bachelor of Science in Fire Science and Safety Engineering, University of Cincinnati
- Executive Fire Officer Program
- Chief Fire Officer Designate
- Institute of Fire Engineers, U.S. Branch, Member Grade

Associated Professional Accomplishments

- Author: Occupational Safety and Health in the Emergency Services, 5th edition (textbook), published by Jones & Bartlett Learning
- Co-author: Firefighting Strategies and Tactics, 4th edition, (textbook), published by Jones & Bartlett Learning
- President and Executive Director of the Florida Association of Special Districts
- Fire Chief of the Year, 2010, Florida Fire Chiefs' Association
- Palm Harbor Citizen of the Year, 2012, Palm Harbor Chamber of Commerce
- Paul Harris Fellow, Rotary Club of Palm Harbor

Comparable experience: Jim has reviewed performance data for numerous related projects, including cooperative services studies for three fire districts in the NW Florida panhandle, and a Master Plan for the South Walton Fire District. He has also completed master or strategic planning projects for several FL local governments. Jim also completed a comprehensive review of the fire department's governance and associated funding options for the Village Center Community Development District.

Rick Talbert, Senior Consultant

Rick is a 41-year veteran of the fire service. A second-generation firefighter, he most recently retired as Fire Chief/Administrator for the South Walton Fire District (SWFD), which protects 84 square miles of northwest Florida's Emerald Coast, a community of 26,000 full-time residents and over 150,000 seasonal visitors. Operating out of five fire stations, SWFD is a career fire and rescue service, consisting of 188 members who provide fire suppression, fire-based advanced life support EMS transport, beach safety lifeguards, fire and life safety and E-911 communications. Rick has served in leadership positions in municipal government and private industry; his most recent role was in an independent fire district. Rick specializes in providing clients with operational and administrative solutions that meet or exceed current and anticipated industry best practices.

Professional Experience

- Former Fire Commissioner, South Walton Fire District
- Fire Chief/Administrator, South Walton Fire District
- Fire Chief, City of Titusville, Florida
- Deputy Fire Chief and 2 years as Battalion Chief of Training for the City of Titusville Fire Department
- Training Officer and Operations Chief for Kennedy Space Center Fire and Rescue
- Developed and trained NASA department members, DOD fire rescue personnel, and foreign military personnel on rescue procedures and operations, supporting 26 Space Shuttle missions in the United States and abroad
- State of Florida Governor's Domestic Oversight Council
- Technical Advisor to the International Association of Fire Chiefs Intrastate Mutual Aid Initiative

Educational Background

- Associate of Fire Science, Eastern Florida State College
- University of Maryland's Staff and Command Program
- Managing Effective Fire Prevention Programs, National Fire Academy, 1997
- Executive Development, National Fire Academy, 1998
- Executive Leadership, National Fire Academy, 1996

Associated Professional Accomplishments

- Florida Certified Emergency Medical Technician (1979-present)
- Chief Officer Designation, Center for Public Safety Excellence (2007-present)
- Florida Fire Chiefs' Association President, 2006-2007
- Florida Fire Service Fire Chief of the Year, 2009

Comparable experience: Rick reviewed performance data for numerous related projects, including cooperative services studies for three fire districts in the NW FL panhandle. He has also completed master or strategic planning projects for several FL local governments.

9. Current and projected workloads for proposed key staff during proposed project timeframe

BJM has assembled a dedicated team to conduct these performance reviews, and will be able to complete the work within the 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.

The projects listed below are also included in the Experiences Summary Matrix listed in #11 below and included as Attachment 2.

Project 1: City of Dunedin, Florida – Performance Review and Report on Internal Cash Controls. Budget was \$10,000, with duration of approximately 1 month.

Project 2: Englewood Fire District – Performance Review and Report on Internal Controls and Cash Controls. Budget was \$15,000, with duration of approximately 1 month.

Project 3: Palm Harbor Special Fire Control and Rescue District – Fiscal year-end audit: schedule of EMS funding received and allowable costs incurred. Budget was \$24,000, with duration of 3 months. Please note that we have provided this service for the past 20 years.

Project 4: Village Center Community Development District (Villages) – comprehensive review of the fire department’s governance and associated funding options. Budget was \$25,000, with duration of approximately 5 months.

Project 5: Polk County Board of County Commissioners – comprehensive recommendations review and analysis. Budget was \$33,000, with duration of approximately 6 months.

Project 6: Pinellas Suncoast Fire & Rescue District – Fiscal year-end audit: schedule of EMS funding received and allowable costs incurred. Budget was \$19,000, with duration of 4 months. Please note that we have provided this service for the past 15 years.

Project 7: East Lake Tarpon Special Fire Control District – Financial audits: schedules of EMS funding received and allowable costs incurred. Budget was \$36,000, with duration of 5 months. Please note that we have provided this service for the past 30 years.

- 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**

Please see Attachment 2.

- 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**

Please see Attachment 3.

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 have 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.

There have been no cases of litigation, judgements, or legal actions entered against BJM CPA or subconsultants for breach of contract within the last five (5) years. There has been no litigation filed against BJM CPA or subconsultants for breach of contract within the last five (5) years.

14. Detailed cost for the Project

The Project will follow the District's required Scope of Work, with approach described in #4 and #5 above. Major milestones include:

- Project Kick Off and Data Collection
- Data Collection
- Performance Review
- Draft Performance Review Report
- Final Performance Review Report

The proposed cost for the Project is **\$57,500**. This is an all-inclusive fee. All expenses, including per diem, are included.

15. Required forms

- Key Personnel Form – Attachment 1
- Experiences Summary Matrix – Attachment 2
- Signed Sworn Statement under Section 287.133(3)(a), Florida Statutes, on Public Entity Crimes – Attachment 3
- Reference Forms – Attachment 4
- E-Verify Affidavits – Attachment 5

ATTACHMENT 1
PROJECT MANAGER AND PROJECT TEAM/KEY PERSONNEL
for
Independent Special Fire Control District Performance Review

BJM's proposed Project Manager and key project team/key personnel are indicated below.

Person's Name	Job Classification	Area of Expertise	Employer	Office Location
Richard Cristini, CPA	Project manager	Strategic planning fiscal analysis, EMS delivery, staffing assessments, benchmarking	BJM CPA, Inc.	Dunedin, FL
Jeanine Bittinger, CPA	Auditor	Strategic planning fiscal analysis, EMS delivery, staffing assessments, benchmarking	BJM CPA, Inc.	Dunedin, FL
James Angle	Senior Consultant	Emergency service master planning, strategic planning, fiscal analysis, incident analysis, cooperative services analysis, EMS delivery, staffing assessments, and benchmarking	J. Angle Group, LLC	Dunedin, FL
Rick Talbert	Senior Consultant	Emergency service master planning, strategic planning, fiscal analysis, incident analysis, cooperative services analysis, EMS delivery, staffing assessments, and benchmarking	J. Angle Group, LLC	Dunedin, FL

**ATTACHMENT 2
EXPERIENCES SUMMARY MATRIX**

Project Manager/Key Personnel Name	Project 1 from Qualification Requirements 10	Project 2 from Qualification Requirements 10	Project 3 from Qualification Requirements 10	Project 4 from Qualification Requirements 10	Project 5 from Qualification Requirements 10
Richard Cristini, CPA	X	X	X		
Jeanine Bittinger, CPA	X	X	X		
James Angle				X	X
Rick Talbert					X

Project Manager/Key Personnel Name	Project 6 from Qualification Requirements 10	Project 7 from Qualification Requirements 10			
Richard Cristini, CPA	X	X			
Jeanine Bittinger, CPA	X	X			
James Angle					
Rick Talbert					

ATTACHMENT 3

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 West Manatee Fire & Rescue District by Neal Bach, CPA, CEO for BJM Group, Inc.

whose business address is 1956 Bayshore Boulevard, Dunedin, FL 34698 and (if applicable) its Federal Employer Identification Number (FEIN) is 85-1204891.

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.

Neal Bach

(Signature)

STATE OF Georgia

COUNTY OF Gwinnett

The foregoing instrument was acknowledged before me by means of physical presence or online notarization, this 31st of May 2022 by Neal Bach, CEO of BJM CPA, Inc, a Georgia company organized under the laws of the State of Georgia, on behalf of the company, who is personally known to me or has produced drivers license as identification.

Jessie Baber

Notary Public

Name (Printed) Jessica Baber

My commission expires August 1, 2023.

(Printed typed or stamped Commissioned name of Notary Public)

JESSICA BABER
NOTARY PUBLIC
Gwinnett County
State of Georgia
My Comm. Expires August 1, 2023

**ATTACHMENT 4
REFERENCE FORMS**

Reference #1

Consultant Name: Richard Cristini, CPA and Jeanine Bittinger, CPA

Reference Entity: Pinellas Suncoast Fire & Rescue District

Reference Contact Person: Erin Brooks, Finance Director

Reference Address: 304-1st St Indian Rocks Beach, FL 33785

Reference Email Address: ebrooks@psfrd.org

Reference Phone No.: 727-595-1117

Project Name: Fiscal year end audit; Schedule of EMS Funding Received and EMS Allowable Costs Incurred

Project Location: Indian Rocks Beach, FL

Consultant Project Manager: Richard Cristini, CPA

Contract Amount: \$19,000

Date Project Commenced: March 2020

Date of Final Completion: June 2020

Description of Work Performed: Performed financial audits and Schedules of EMS Funding for Pinellas County for past 15 years.

Reference 2

Consultant Name: Richard Cristini, CPA and Jeanine Bittinger, CPA

Reference Entity: Palm Harbor Special Fire Control and Rescue District

Reference Contact Person: Chief Scott Sanford

Reference Address: 250 West Lake Road Palm Harbor, FL 34686

Reference Email Address: firechief@palmharborfd.com

Reference Phone No.: 727-683-1640

Project Name: Fiscal year end audit; Schedule of EMS Funding Received and EMS Allowable Costs Incurred

Project Location: Palm Harbor, FL

Consultant Project Manager: Richard Cristini, CPA

Contract Amount: \$24,000

Date Project Commenced: April 2020

Date of Final Completion: June 2020

Description of Work Performed: Performed financial audits and Schedules of EMS funding for Pinellas County for the past 20 years.

Reference 3

Consultant Name: Richard Cristini, CPA and Jeanine Bittinger, CPA

Reference Entity: East Lake Tarpon Special Fire Control District

Reference Contact Person: Chief Jason Gennaro

Reference Address: 3375 Tarpon Lake Blvd Palm Harbor, FL 34685

Reference Email Address: jgennaro@elfr.org

Reference Phone No.: 727-784-8668

Project Name: Performed financial audits; Schedules of EMS Funding Received and EMS Allowable Costs Incurred

Project Location: Palm Harbor, FL

Consultant Project Manager: Richard Cristini, CPA

Contract Amount: \$36,000

Date Project Commenced: February 2020

Date of Final Completion: June 2020

Description of Work Performed: Performed financial audits and Schedules of EMS Funding for Pinellas County for the past 30 years.

Reference 4

Consultant Name: Jim Angle

Reference Entity: South Walton Fire District

Reference Contact Person: Ryan Crawford, Fire Chief

Reference Address: 911 North County Highway 393, Santa Rosa Beach, FL 32459

Reference Email Address: rcrawford@swfd.org

Reference Phone No.: 850.267.1298

Project Name: South Walton Fire District Master Plan

Project Location: Santa Rosa Beach, FL

Consultant Project Manager: Jim Angle

Contract Amount: \$46,000

Date Project Commenced: May 2019

Date of Final Completion: January 2020

Description of Work Performed: Master Plan

Reference 5

Consultant Name: Jim Angle and Rick Talbert

Reference Entity: Navarre Beach Fire

Reference Contact Person: Dan Fureigh, Fire Chief

Reference Address: 1413 Utility Drive, Navarre, FL 32566

Reference Email Address: chief@navarrebeachfire.org

Reference Phone No.: 850.939.2448

Project Name: Cooperative services review

Project Location: Three special districts within Santa Rosa County

Consultant Project Manager: Jim Angle

Contract Amount: not available

Date Project Commenced: June 2018

Date of Final Completion: October 2018

Description of Work Performed: Cooperative services review

Reference 6

Consultant Name: Jim Angle and Rick Talbert

Reference Entity: Polk County Fire Rescue

Reference Contact Person: Robert Weech, Fire Chief

Reference Address: 1295 Brice Boulevard, Bartow, FL 33830

Reference Email Address: RobertWeech@polk-county.net

Reference Phone No.: 863.519.7350

Project Name: Comprehensive Recommendations Review and Analysis

Project Location: Polk County Florida

Consultant Project Manager: Jim Angle

Contract Amount: \$33,000

Date Project Commenced: January 2021

Date of Final Completion: May 2021

Description of Work Performed: Comprehensive Recommendations Review and Analysis

ATTACHMENT 5

**CONSULTANT E-VERIFY
AFFIDAVIT**

I hereby certify that BJM CPA, Inc. 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 BJM Group, Inc. proof of registration in the E-Verify system is attached to this Affidavit.

Neal Bach

Print Name: Neal Bach

Date: May 31, 2022

STATE OF Georgia

COUNTY OF Gwinnett

The foregoing instrument was acknowledged before me by means of physical presence or online notarization, this 31st day of May 2022 by Neal Bach, CEO of BJM CPA, Inc., a company organized under the laws of the State of Georgia, on behalf of the company, who is personally known to me or has produced drivers license as identification.

Jessie Baber

Notary Public

Name (Printed) Jessica Baber

My commission expires August 1, 2023.

(Printed typed or stamped Commissioned name of Notary Public)

JESSICA BABER
NOTARY PUBLIC
Gwinnett County
State of Georgia
My Comm. Expires August 1, 2023

Company ID Number:1111175

Client Company ID Number:1739685

If you have any questions, contact E-Verify at 1-888-464-4218.

Approved by:

Employer BJM Employer Inc	
Name (Please Type or Print) Maria Moreno	Title
Signature Electronically Signed	Date September 23, 2021
E-Verify Employer Agent Sentric Inc	
Name (Please Type or Print) Josh Davis	Title
Signature Electronically Signed	Date September 23, 2021
Department of Homeland Security - Verification Division	
Name USCIS Verification Division	Title
Signature Electronically Signed	Date September 23, 2021

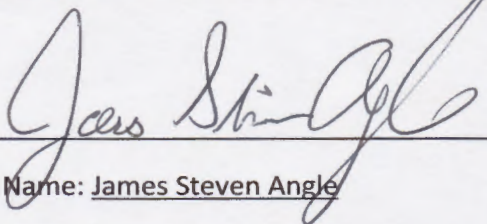
SUBCONSULTANT E-VERIFY

AFFIDAVIT

I hereby certify that J. Angle Group, LLC 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 J. Angle Group, LLC proof of registration in the E-Verify system is attached to this Affidavit.



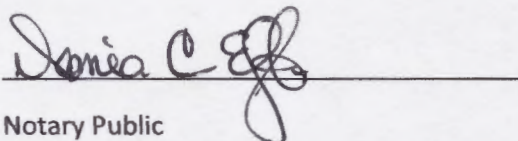
Print Name: James Steven Angle

Date: 5/28/2022

STATE OF Florida

COUNTY OF Marion

The foregoing instrument was acknowledged before me by means of physical presence or online notarization, this May 28, 2022 by James Steven Angle of J. Angle Group LLC a LLC company organized under the laws of the State of Florida, on behalf of the company, who is personally known to me or has produced FL Driver License as identification.

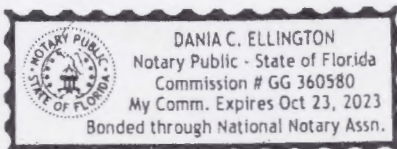


Notary Public

Name (Printed) Dania C. Ellington

My commission expires Oct 23, 2023

(Printed typed or stamped Commissioned name of Notary Public)



Company ID Number: 1839642

Approved by:

Employer J ANGLE GROUP LLC	
Name (Please Type or Print) James Angle	Title
Signature Electronically Signed	Date 05/27/2022
Department of Homeland Security – Verification Division	
Name (Please Type or Print) USCIS Verification Division	Title
Signature Electronically Signed	Date 05/27/2022

