



# Bill Furst

## SARASOTA COUNTY PROPERTY APPRAISER

### REQUEST FOR QUOTE

<b>RFQ NO.</b>	2024-01
<b>TITLE</b>	PRINTING AND MAILING SERVICES
<b>AVAILABLE</b>	Tuesday, March 5 <sup>th</sup> 2024
<b>DUE DATE</b>	5:00 EST Friday, March 29 <sup>th</sup> 2024
<b>SUBMIT TO</b>	Sarasota County Property Appraiser ATTN: Finance Department 2001 Adams Lane Sarasota, FL 34237
<b>AWARD DATE</b>	April 12 <sup>th</sup> 2024

Download RFQ Information: <https://www.sc-pa.com/our-office/rfq>



**Bill Furst**  
**SARASOTA COUNTY PROPERTY APPRAISER**

2001 Adams Lane, Sarasota, FL, 34237 | Ph: 941.861.8200 | F: 941.861.8260 | [www.sc-pa.com](http://www.sc-pa.com)

**March 4, 2024**

**INVITATION FOR QUOTES (RFQ) NO. 2024-01 Printing and Mailing Services**

Dear Potential Respondent:

The SARASOTA COUNTY PROPERTY APPRAISER (SCPA) of Florida invites qualified firms to submit responses per the requirements stated herein no later than **5:00 PM EST on Friday, MARCH 29<sup>th</sup>, 2024**, for Request for Quote.

**RFQ NO. 2024-01 PRINTING AND MAILING SERVICES**

Interested businesses may secure the solicitation package and all other pertinent information by visiting our website at <https://www.sc-pa.com/our-office/rfq> for general information and including any addenda and requirements.

Questions regarding this solicitation shall be submitted in writing to [PA@SC-PA.com](mailto:PA@SC-PA.com) Subject Line: RFQ 2024-01, no later than 5:00 PM EST on **March 11<sup>th</sup>, 2024**. Responses to those questions considered material to the solicitation will be made available as formal addenda on our website, referenced above. It is the responsibility of prospective vendors to ensure they are aware of all addenda issued relative to this solicitation.

Respondents **shall submit all quote documents in a sealed envelope to:**

Sarasota County Property Appraiser  
ATTN: Finance Department RFQ 2024-01  
2001 Adams Lane  
Sarasota, FL 34237

**Late submissions shall not be accepted.**

The selection of the successful respondent(s) shall be at the discretion of this office and shall be made promptly after the receipt and evaluation of all RFQ responses. This office reserves the right to reject submissions, to waive irregularities in any submission, and to make awards in the best interest of this agency and the citizens we serve.

# REQUEST FOR QUOTES (RFQ) NO. 2024-01 Printing and Mailing Services

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## SECTION 1.0 GENERAL TERMS AND CONDITIONS

**DEFINITIONS** When used herein (defined below) or in related documents, the following terms shall have the meanings given below:

**Addenda/Addendum:** Additional information provided to prospective Proposers to correct, clarify, or supplement the Project, Specifications, or other Agreement Documents.

**Advertisement for Quotes:** The public notice inviting the submission of Quotes for the work. Advertisement on [www.sc-pa.com](http://www.sc-pa.com)

**Agreement Documents:** The Invitation or Request and Instructions to Proposers, Submitted Quote Form, together with all Addenda, Award, Purchase Orders, Project Specifications, Timeline, and Schedules, and *Executed Contractual Agreement upon award.*

**Agreement:** The written contract between SCPA and the Proposer for the performance of the work per the requirements of the Agreement Documents and the payment of the agreed consideration upon completion of the print projects and job/s awarded.

**Data:** Data means all sources of SCPA data provided to a vendor for print materials. Possible data platforms include MS Access database tables, MS Excel, SQL Tables, CSV, or a flat file.

**Project Manager:** The duly authorized representative designated to manage the project.

**Print Projects and Mailings:** The services required by the Agreement Documents, which include all labor, materials, delivery, and services to be provided by the Proposer to fulfill the obligations.

**Vendor:** The individual, firm, partnership, corporation, or joint venture whose Quote is accepted and who enters into an Agreement with SCPA and who is liable for the acceptable performance of the work.

**Proposer:** Any individual, firm, partnership, or corporation submitting a Quote following the Instructions to Proposers.

**Quote Documents:** The Advertisement for Quotes, Instructions to Proposers, Quote Form, Contractual Agreement (draft), General Conditions, Special Provisions, Technical Specifications, Scope or Work, Project Specifications, and Jobs, together with all Addenda.

**SCPA:** The Sarasota County Property Appraiser, a county officer whose jurisdiction is Sarasota County, a political subdivision of the State of Florida.

**1.1 SCPA WEBSITE** Quotes, addenda, and all other RFQ-related information are available at <https://www.sc-pa.com/our-office/rfq>

**1.2 PROPOSER NOTIFICATION** SCPA encourages a full and open competition among all available qualified Proposers. All Proposers regularly engaged in the type of work specified in the Quote Solicitation are encouraged to submit Quotes. **Our enclosed Quote Form is to be used in the submitted response.**

Proposers must be authorized to transact business in the **State of Florida** and shall have all applicable insurance, permits, licenses, etc. which may be required by federal, state, or local law. The Proposer's site for printing materials for mail and distribution must be in the State of Florida.

**1.3 PROPOSER RESPONSIBILITIES** Proposers are required to submit their quotes upon the following express conditions: Proposers shall thoroughly examine the specifications, schedules, instructions, and all agreement documents. Proposers are advised that all SCPA agreements are subject to all legal requirements provided for in applicable County Ordinances, State Statutes, and Federal Statutes.

**1.4 INDEPENDENT PROPOSER RELATIONSHIP** The Proposer is and shall be, in the performance of all work services and activities under the Agreement, an independent entity, and not an employee or agent of SCPA.

**1.5 PREPARATION OF QUOTES ONLY THIS FORM OF QUOTE WILL BE ACCEPTED:** All information required by the Quote form shall be furnished. The Proposer shall sign each continuation sheet on which an entry is made. Unit prices shall be shown, and the unit price shall govern.

The proposed delivery times must be strictly adhered to ensure meeting guidelines to SCPA from the Department of Revenue. Where the term on or before is used for a timeline, the Proposer understands that the project must be planned, scheduled, staged, and fully prepared to meet completeness to SCPA at the required timelines.

SCPA will pay no sales tax. A copy of the sales tax certificate will be provided to the awarded vendor. SCPA is exempt from payment to its vendors of State of Florida sales tax and, therefore, such taxes should not be figured into the Quote.

**1.6 SUBMISSION AND RECEIPT OF QUOTES** Quotes having any erasures or corrections must be initialed and dated by the Proposer in ink. This Quote document shall be typewritten or filled in with pen and ink.

**1.7 SUBMISSION OF QUOTES** Proposers shall submit all Quote documents to SCPA in person, or by delivery to the address posted herein. Late submissions shall not be accepted.

**1.8 ADDENDA** SCPA may issue an addendum in response to any inquiry received, before the Quote opening, which changes, adds to, or clarifies the terms, provisions, or requirements of the solicitation. It is the Proposer's responsibility to ensure receipt of all addenda and any accompanying documents.

**1.9 REJECTION OF QUOTES** SCPA reserves the right to reject any or all quotes before the award. Reasonable efforts will be made to either award the agreement or reject all quotes within 4 weeks after the quote's opening date.

**1.10 INTERPRETATION OF THE APPROXIMATE QUANTITIES** The Proposer's attention is called to the fact that the estimate of quantities to be furnished under the specifications is approximate only and not guaranteed. SCPA does not assume any responsibility that the final quantities shall remain in strict accordance with the estimated quantities, nor shall the Proposer plead misunderstanding or deception because of such estimate of quantities.

**1.11 QUANTITIES** SCPA specifically reserves the right to accept all or any part of the Quote, to split the award, or to increase or decrease the quantity to meet additional or reduced requirements of SCPA, without such change affecting the agreement unit price outlined in the quote form by the Proposer.

**1.12 DESCRIPTION OF DELIVERABLES** Proposers must indicate any variances to the specifications, terms, and conditions, no matter how slight. If variations are not stated in the Quote, it shall be construed that the Quote fully complies with the Specifications, Terms, and Conditions.

Proposers are required to state exactly what they intend to furnish; otherwise, they shall be required to furnish the items as specified.

Proposers will submit, with their quote, necessary samples to evaluate and determine the quality of the item(s) they are quoting; including sample print materials, letter paper, card stock, and envelopes -refer to specifications to include adequate samples, and/or comparable substitutions.

SCPA shall be the sole judge of equality and its decision shall be final.

**Proposer(s) shall acknowledge receipt of any formal Addenda by signing and including it with their Quote.** Failure to include a signed formal Addenda in its Quote shall deem its Quote non-responsive; however, SCPA may waive this requirement in its best interest.

**1.13 COMPETENCY OF PROPOSERS** Quotes will be considered only from firms that are regularly engaged in the business of providing the goods and/or services as described in this Quote(s); have a record of performance for a reasonable period; and have sufficient financial support, equipment, and organization to ensure that they can satisfactorily deliver the material and/or services if awarded an Agreement under the terms and conditions herein stated.

**1.14 AWARD OF QUOTE** SCPA reserves the right to accept and award the print jobs in the aggregate, or by job number.

Successful Proposer shall be notified in writing of the award, and it shall be posted on our website—  
<https://www.sc-pa.com/our-office/rfq>

**1.15 DISCLAIMER** SCPA may, in its sole and absolute discretion, accept or reject, in whole or in part, for any reason whatsoever any or all Quotes; re-advertise this Quote; postpone or cancel at any time this Quote process; or, waive any formalities of or irregularities in the Proposing process. Quotes that are not submitted on time and/or do not conform to SCPA's requirements will not be considered. SCPA reserves the right to determine, at its sole discretion, the lowest responsive and responsible Proposer. In all cases, SCPA shall have no liability to any Proposer for any costs or expenses incurred in connection with this Quote or otherwise.

**1.16 EXCEPTIONS TO QUOTE** The Proposer must indicate any exceptions it wishes to take to any of the terms in this Quote and outline what if any, alternative is being offered. All exceptions and alternatives shall be included and delineated, in writing, in the Quote. SCPA, at its sole and absolute discretion, may accept or reject any or all exceptions and alternatives.

**1.17 PUBLIC RECORDS LAW** According to Florida Statute 119.07, public records may be inspected and examined by anyone desiring to do so, at a reasonable time, under reasonable conditions, and supervision by the custodian of the public record. All Quotes become subject to this statute, notwithstanding Proposers' or proposers' requests to the contrary, at the time SCPA provides notice of a decision or intended decision, or 30 days after Quote or quote opening, whichever is earlier.

Proposers are hereby notified and agree that all information submitted as part of, or in support of Quote submittals will be available for public inspection after the opening of Quotes in compliance with Chapter 119 of the Florida Statutes. If the Proposer submits trade secrets, as defined under the applicable Florida Statutes, the Proposer shall stamp each page on which the trade secret is listed and mark the information deemed to be a trade secret. The Proposer shall also submit a separate document listing each page in which a trade secret is listed. Additionally, using the appropriate legal analysis, the separate document must clearly state why the information marked as a trade secret is deemed a trade secret under the applicable Florida Statutes and Florida case law as to be exempt under Chapter 119 of the Florida Statutes.

**1.18 NOTICE REQUIREMENTS UNDER THE AGREEMENT** all notices for Insurance Requirements shall be in writing and shall be deemed sufficiently served if delivered by Registered or Certified Mail, with return receipt requested; or delivered personally, or via fax or e-mail (if provided below) and followed with delivery of hard copy; and in any case addressed as follows:

Sarasota County Property Appraiser  
ATTN: Finance Department  
2001 Adams Lane  
Sarasota, FL 34237

Fax: 941-861-8260  
Email: PA@SC-PA.com

Notices, if applicable, will be sent to the Proposer at the physical address, e-mail address, and fax numbers and to the person listed in the Proposer's quote. Either party may at any time designate a different address and/or contact person by giving notice as provided above to the other party. Such notices shall be deemed given upon receipt by the addressee.

Notices may not be used for price modifications.

**1.19 INVOICING/PAYMENT** For this RFQ, printed material deliverables are considered "completed" by SCPA after they have been printed and housed in the Proposer's climate-controlled storage and after they have been approved by SCPA.

All invoices shall be mailed to:

Sarasota County Property Appraiser  
ATTN: Finance Department  
2001 Adams Lane  
Sarasota, FL 34237

Per Florida State Statutes, Chapter 218, vendors can expect prompt payment for goods after receipt of services and a proper invoice. SCPA will not make advance payments, or make deposits in advance of receipt of goods, and will not pay C.O.D.

For each mailing print project, the Proposer shall provide SCPA with a USPS mailing transaction receipt, PS Form 3607R, or equivalent document for postage reimbursement. Payment of postage costs to the authorized and awarded vendor by SCPA for the USPS mailing of print material volumes, over 100,000 mail pieces, may submit an invoice for postage upon print.

Payment shall be made to the awarded vendor for printed materials and mail services after the completion of each project. SCPA shall not be responsible for print quantity overruns and unmailed print items except for items that can be repurposed for a future print job, such as envelopes. Envelope inventory excess shall be billed upon consumption in future mailings.

**1.20 NATURE OF THE AGREEMENT** Any agreement resulting from this RFQ incorporates all understandings applicable to the matters contained in the Agreement. The parties agree that there are no commitments, agreements, or understandings concerning the subject matter of the Agreement that are not contained in the Agreement and that the Agreement contains the entire agreement between the parties as to all matters contained herein. The Proposer shall provide the services outlined in the Scope of Services and render full and prompt cooperation with SCPA in all aspects of the Services performed hereunder. The Proposer affirms the performance of all things necessary for or incidental to the effective and complete performance of all Work and Services under this Agreement for print materials and mailings. All things not expressly mentioned in the Agreement but necessary to carry out its intent are required by the Agreement, and the Proposer shall perform the same as though they were specifically mentioned, described, and delineated.



The Proposer shall furnish all materials, supplies, and other items required to perform the Work and Services that are necessary for the completion of this Agreement. All Work and Services shall be accomplished at the direction of and to the satisfaction of SCPA's Project Manager, or designee.

**1.21 SERVICES AND OBLIGATIONS** The Proposer warrants that it has reviewed SCPA's requirements and has asked such questions and conducted such other inquiries as the Proposer deemed necessary to determine the price the Proposer will charge to provide the Work and Services to be performed under this Agreement. The compensation for all Work and Services performed under this Agreement, including all costs associated with such Work and Services, shall be in the total amount submitted on the Quote Form.

SCPA shall have no obligation to pay the Proposer any sum(s) above this amount, except for a change and/or modification to the Agreement which is approved and executed in writing by SCPA and the Proposer.

**1.22 PRICING** Prices shall remain firm and fixed for the term of the Agreement, including any option or extension periods; however, the Proposer may offer volume-based discounts to SCPA at any time during the Agreement term, including any renewal or extension thereof.

**1.23 GUARANTEE** The Proposer shall be responsible for technically deficient designs, reports, or deliverables due to its errors and omissions, and shall promptly correct or replace all such deficient work due to its errors and omissions without cost to SCPA.

The Proposer warrants and represents that its personnel have the proper skill, training, background, knowledge, experience, rights, authorizations, integrity, character, and licenses as necessary to perform the Services described herein, competently, and professionally. The Proposer shall always cooperate with SCPA and coordinate its respective work efforts to maintain the progress most effectively and efficiently in performing the Services. The Proposer shall comply with all provisions of all federal, state, and local laws, statutes, ordinances, and regulations that apply to the performance of the Agreement.

**1.24 AGREEMENT** Any agreement or purchase order resulting from the acceptance of an offer shall be on forms either supplied or approved by SCPA. The intent and content of this RFQ and the Price Proposal provided by the Proposer will be an attachment to the resulting agreement. Any amendments shall require the formal written approval of both parties.

**1.25 ADDITIONAL SERVICES** While SCPA has listed all major services within this solicitation, there may be similar services that may be purchased by the SCPA during the term of this agreement. Under these circumstances, a representative of the SCPA will contact the awarded Vendor to obtain a price quote for similar services. The SCPA reserves the right to award these similar items to the Vendor based on the lowest price quoted or to acquire the services through a separate solicitation.

**1.26 SUB-AGREEMENTS** Unless otherwise specified in this Quote Solicitation, the successful Proposer shall not subcontract their agreement, and portions of jobs/work product may not be subcontracted without the prior written consent of SCPA.

**1.27 ASSIGNMENT** The successful Proposer shall not assign, transfer, hypothecate, or otherwise dispose of this agreement, including any rights, title, or interest therein, or its power to execute such agreement to any person, company, or corporation.

**1.28 VERBAL INSTRUCTIONS PROCEDURE** No negotiations, decisions, or actions shall be initiated or executed by the Proposer as a result of any discussions with any SCPA employee. Only those communications that are in writing from an authorized SCPA representative may be considered. Only written communications from the Proposer, which are assigned by a person designated as authorized to bind the Proposer, will be recognized by SCPA as duly authorized expressions on behalf of the Proposer.

**1.29 DELIVERY, INSPECTION & TITLE** Prices quoted, and deliveries are to be FOB Destination. Inspection and acceptance will be the destination unless otherwise provided. Title to/or risk of loss or damage to all items shall be the responsibility of the successful Proposer until acceptance by SCPA unless loss or damage results from negligence by SCPA. If the materials or services supplied to SCPA are found to be defective or do not conform to specifications, SCPA reserves the right to cancel the order upon written notice to the Proposer and return the product at the Proposer's expense.

**1.30 CLAIMS** Successful Proposer(s) will be responsible for making any and all claims against carriers for missing or damaged items.

**1.31 AGREEMENT RENEWAL** Any agreement may be renewed within the parameters outlined in the solicitation document or negotiated terms.

**1.32 MODIFICATION OF AGREEMENT** The agreement may be modified by mutual consent, in writing through the issuance of a modification to the agreement, purchase order, change order, or award sheet, as appropriate.

**1.33 CONDITION OF MATERIALS AND PACKAGING** All materials, supplies, and components supplied under this Quote must be new and unused, free from defects. No others will be accepted under the terms and intent of this Quote.

**1.34 SAMPLES** Samples, when required, must be submitted within the time specified at no expense to SCPA. If not destroyed or used up during testing, samples will be returned upon request at the Proposer's expense.

**1.35 FRAUD AND MISREPRESENTATION** Any individual, corporation, or other entity that attempts to meet its obligations with SCPA through fraud, misrepresentation, or material misstatement, may be debarred from doing business with SCPA. SCPA may also elect to terminate or cancel any other agreements with such individual, corporation, or entity with no penalty to SCPA for such termination.

**1.36 COLLUSION** The Proposer, by affixing a signature to this quote, agrees to the following:

Proposer certifies that his/her Quote is made without previous understanding, agreement, or connection with any person, firm, or corporation, making a Quote for the same items, or the initiating SCPA department, and is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action.

Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, have in any way colluded, conspired, connived, or agreed, directly or indirectly, with any other Proposer, firm, or person to submit a collusive or sham response in connection with the work for which the Quote has been submitted; or to refrain from proposing in connection with such work; or have in any manner, directly or indirectly, sought by a person to fix the price or prices in the Quote response or of any other Proposer, or to fix any overhead, profit, or cost elements of the Quote price or the Quote price of any other Proposer, or to secure through any collusion, conspiracy, connivance, or unlawful agreement with an advantage over others, or any person interested in the proposed work.

The price or prices quoted in the Quote response are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Proposer or any other of its agents, representatives, owners, employees, or parties in interest.

**1.37 COMPLIANCE WITH PUBLIC RECORDS LAW** Proposer agrees to comply with public records laws. This includes but is not limited to:

Keep and maintain public records as required by the Florida Statutes.

Upon request from SCPA, provide SCPA with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in the applicable Florida Statutes.

Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the agreement term and following completion of the agreement.

Upon completion of the agreement, at no cost to SCPA, the Proposer shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements.

If the Proposer keeps and maintains public records upon completion of the agreement, the Proposer shall meet all applicable requirements for retaining public records.

If the Proposer has questions regarding the application of Chapter 119, Florida Statutes, to the Proposer's duty to provide public records relating to this agreement, contact the custodian of public records at SCPA:

Chief Deputy Brian Loughrey  
Sarasota County Property Appraiser  
2001 Adams Lane  
Sarasota, FL 34237

Phone: 1-941-861-8299  
Email: Bloughrey@sc-pa.com

**1.38 SCRUTINIZED COMPANIES** Florida Statute § 287.135: By submitting this quote, the Proposer certifies that the company is not participating in a boycott of Israel. Proposer must also certify that Proposer is not on the Scrutinized Companies that Boycott Israel list, not on the Scrutinized Companies with Activities in Sudan List, and not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or has been engaged in business operations in Cuba or Syria.

**1.39 INDEMNIFICATION AND HOLD HARMLESS AGREEMENT** The Proposer shall be fully liable for the actions of its agents, employees, partners, or subcontractors and shall fully indemnify, defend, and hold harmless the SCPA and its officers, agents, and employees from suits, actions, damages, and costs of every name and description, including attorney's fees, arising from or relating to personal injury and damage to real or tangible personal property, alleged to be caused in whole or part by the Proposer, its agents, employees, partners or subcontractors; provided however, that the Proposer shall not indemnify for that portion of any loss or damages proximately caused by the negligent act or omission of the SCPA.

**1.39 CONFLICT OF LAW** If this agreement is disputed, and should it be necessary to litigate, the substantive and procedural laws of the State of Florida shall govern the outcome of such litigation. This shall apply notwithstanding such factors which include, but are not limited to, the place where agreement is entered into, the place where an accident arises, and notwithstanding the application of conflicts of law principles.

**1.40 PUBLIC ENTITY CRIMES** Florida Statutes, Section 287.133(2)(a) 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 Florida Statutes, Section 287.017 for CATEGORY TWO for a period of 36 months following the date of being placed on the convicted vendor list.

**1.41 SOLICITATION, GIVING, AND ACCEPTANCE OF GIFTS** The Proposer shall comply with Florida Statute 112.313, which prohibits the solicitation or acceptance of Gifts.

**1.42 ETHICS** SCPA will not purchase any goods or services from any person who is actively employed by SCPA or from any business or entity of which the employee or the employee's spouse or child is an agent, officer, partner, director, or proprietor, or in which they have a material interest or discretionary authority. Any such individual or business shall be disqualified.

**1.43 LOCAL, STATE, AND FEDERAL COMPLIANCE REQUIREMENTS** Proposer agrees to comply, subject to applicable professional standards, with the provisions of all applicable Federal, State, and County laws,

regulations, statutes, ordinances, rules, and regulations that may pertain to the Services required under the Agreement.

**1.44 NONDISCRIMINATION** During the performance of this Agreement, Proposer agrees to not discriminate against any employee or applicant for employment because of race, religion, color, sex, handicap, marital status, age, or national origin and will take affirmative action to ensure that they are afforded equal employment opportunities without discrimination. By entering into this Agreement with SCPA, the Proposer attests that it is not in violation of the Americans with Disabilities Act of 1990 (and related Acts). If the Proposer or any owner, subsidiary, or other firm affiliated with or related to the Proposer is found by the responsible enforcement agency to violate the Act, such violation shall render this Agreement void.

**1.45 CONFLICT OF INTEREST** The Proposer represents that:

No officer, director, employee, agent, or another consultant of SCPA or a member of the immediate family or household of the aforesaid has directly or indirectly received or been promised any form of benefit, payment, or compensation, whether tangible or intangible, in connection with the grant of the Agreement.

There are no undisclosed persons or entities interested in the Proposer in the Agreement. The Agreement is entered into by the Proposer without any connection with any other entity or person making a quote for the same purpose, and without collusion, fraud, or conflict of interest.

No elected or appointed officer or official, director, employee, agent, or other consultant of SCPA, of the State of Florida (including elected and appointed members of the legislative and executive branches of government), or member of the immediate family or household of any of the aforesaid, are interested on behalf of or through the Proposer directly or indirectly in any manner whatsoever in the execution or the performance of the Agreement, in the services, supplies, or work, to which the Agreement relates, or in any portion of the revenues; or Is an employee, agent, advisor, or consultant to the Proposer or the best of the Proposer's knowledge, or supplier to the Proposer.

Neither the Proposer nor any officer, director, employee, agent, parent, subsidiary, or affiliate of the Proposer shall have an interest that conflicts with the Proposer's faithful performance of its obligations under the Agreement.

The provisions of this RFQ are supplemental to, not in place of, all applicable laws concerning conflict of interest. In the event there is a difference between the standards applicable under the Agreement and those provided by statute, the stricter standard shall apply.

In the event Proposer has no prior knowledge of a conflict of interest as set forth above and acquires information that may indicate that there may be an actual or apparent violation of any of the above, Proposer shall promptly bring such information to the attention of SCPA's Project Manager. Proposer shall thereafter cooperate with SCPA's review and investigation of such information and comply with the instructions Proposer receives from the Project Manager regarding remedying the situation.

**1.46 BANKRUPTCY** SCPA reserves the right to terminate this agreement if, during the term of any agreement the Proposer has with SCPA, the Proposer becomes involved as a debtor in a bankruptcy proceeding, or becomes involved in a reorganization, dissolution, or liquidation proceeding, or if a trustee or receiver is appointed over all or a substantial portion of the property of the Proposer under federal bankruptcy law or any state insolvency law.

**1.47 GOVERNING LAW** This Agreement, including appendices, and all matters relating to this Agreement (whether in agreement, statute, tort (such as negligence), or otherwise) shall be governed by, and construed by, the laws of the State of Florida.

**1.48 CANCELLATION FOR UNAPPROPRIATED FUNDS** The obligation of SCPA for placing an order to an awarded Proposer is limited to the availability of funds appropriated for the fiscal period, and continuation of the agreement into a subsequent fiscal period is subject to appropriation of funds unless otherwise authorized by law.

**1.49 JURISDICTION AND VENUE** The parties agree that all litigation between them in the state courts shall exclusively take place in Sarasota County, Florida. SCPA and vendor waive the right to a trial by jury for disputes arising out of an accepted quote and any purchase orders resulting from an awarded bid.

**END OF SECTION**

## SECTION 2.0 INSURANCE REQUIREMENTS

Insurance Types:	
A	Commercial General Liability
B	Professional Liability including Errors and Omissions
C	Cyber Crime Insurance
D	Worker's Compensation Insurance

**2.1 INSURANCE TYPES** The Proposer shall maintain and carry in full force during the Term the insurance required herein. Upon SCPA's notification, the Proposer shall furnish to SCPA Certificates of Insurance that indicate that insurance coverage has been obtained which meets the requirements as outlined below:

- A) Commercial General Liability Insurance on a comprehensive basis in an amount not less than \$1,000,000 per occurrence for work performed under this agreement, Sarasota County Board of County Commissioners and SARASOTA COUNTY PROPERTY APPRAISER (SCPA) must be shown as additional insured(s) with respect to this coverage. The mailing address of SCPA 2001 Adams Lane, Sarasota FL 34237 as the certificate holder, must appear on the certificate of insurance.
- B) Professional Liability Insurance including Errors and Omissions with minimum limits of \$1,000,000 per occurrence, if occurrence form is available; or claims made form with "tail coverage" extending three (3) years beyond completion and acceptance of the project with proof of "tail coverage" to be submitted with the invoice for final payment. In lieu of "tail coverage," vendor may submit annually to SCPA a current Certificate of Insurance proving claims made insurance remains in force throughout the same (3) year period.
- C) Cyber Crime Liability Insurance on a comprehensive basis in an amount not less than \$1,000,000 per occurrence for work performed under this agreement. The mailing address of SCPA 2001 Adams Lane, Sarasota FL 34237 as the certificate holder, must appear on the certificate of insurance.
- D) Worker's Compensation Insurance on a statutory basis with employer liability coverage in an amount not less than \$500,000 per occurrence for work performed under this agreement. The mailing address of SCPA 2001 Adams Lane, Sarasota FL 34237 as the certificate holder, must appear on the certificate of insurance.

**2.2 COVERAGE AND NOTICE** Certificates of Insurance must indicate that for any cancellation of coverage before the expiration date, the issuing insurance carrier will mail thirty (30) days written advance notice to the certificate holder and any additional insureds. In addition, the Proposer hereby agrees not to modify the insurance coverage without thirty (30) days written advance notice to SCPA.

**2.3 AWARD CONTINGENCY** The Award of this Agreement is contingent upon the receipt of the insurance documents, as required, within fifteen (15) calendar days after SCPA notification to the Proposer to comply before the award is made. If the insurance certificate is received within the specified time frame but not in the manner prescribed in the Agreement, the Proposer shall be verbally notified of such deficiency and shall have an additional five (5) calendar days to submit a corrected certificate to SCPA. If the Proposer fails to submit the required insurance documents in the manner prescribed in the Agreement within twenty (20) calendar days after SCPA notification to comply, the Proposer shall be in default of the terms and conditions and the award of the Agreement will be rescinded, unless such time frame for submission has been extended by SCPA.

**2.4 INSURANCE RENEWAL** The vendor shall be responsible for assuring that the insurance certificates required in conjunction with this Section remain in force for the duration of the period of the Agreement, including all option years or extension periods that may be granted by SCPA. If insurance certificates are scheduled to expire during the period, the vendor shall be responsible for submitting new or renewed insurance certificates to SCPA at a minimum of thirty (30) calendar days in advance of such expiration. If expired certificates are not replaced with new or renewed certificates that cover the period, SCPA shall suspend the Agreement until the new or renewed certificates are received by SCPA in the manner prescribed herein; provided, however, that this suspended period does not exceed thirty (30) calendar days. Thereafter, SCPA may, at its sole discretion, terminate this agreement.

**END OF SECTION**



## SECTION 3.0 SPECIAL CONDITIONS

**3.1 PERFORMANCE OF SERVICES** Proposer understands and agrees to perform agreement services in a professional and workmanlike manner and comply with all applicable laws, ordinances, rules, regulations, and permits. Services and materials not conforming to the intent of the Agreement or meeting the approval of SCPA may be rejected. Replacements and/or rework, as required, shall be accomplished on a timely basis at no additional cost to SCPA.

**3.2 REQUESTS FOR INFORMATION (RFI)** Any questions regarding the specifications shall be addressed to SCPA by the deadline stated herein for receiving RFIs via e-mail at [PA@SC-PA.COM](mailto:PA@SC-PA.COM) with RFQ 2024-01 in the Subject Line.

Any oral instructions given are not binding. All questions and interpretations will be clarified in writing to all Proposers by written addenda published on [www.sc-pa.com](http://www.sc-pa.com). Failure of a Proposer to retrieve and/or acknowledge any addendum shall not release the Proposer from any obligations under this Quote.

**3.3 SCHEDULE OF EVENTS** SCPA will use the following tentative schedule in the selection process.

<b>Event</b>	<b>Date</b>
RFQ Available	March 5, 2024
Last Date Receipt of RFIs (by 5:00 pm EST)	March 11, 2024
Responses Due (5:00 pm EST)	March 29, 2024
Award Date	April 12, 2024
Agreement Start Date	April 29, 2024

SCPA reserves the right to change and/or delay scheduled dates. If SCPA finds it necessary to change any of these dates, it will be accomplished by an addendum.

**3.4 EVALUATION** All responses will be reviewed and evaluated by SCPA. A recommendation for award will be submitted to the Property Appraiser for final approval. The responses shall be evaluated based on the criteria below to determine the responses that are in the best overall interest of SCPA and the citizens we serve.

Awards will be made only to responsible, licensed firms possessing the potential ability to perform successfully under the terms and conditions of these specifications. Proposers must be regularly engaged in the trade or trades relating to the quotes submitted.

**3.5 COMPETENCY OF PROPOSERS** Quotes shall be considered only from firms that have been continuously engaged in providing products and services similar to those specified herein for a reasonable period and that are presently engaged in the provision of these services. Agreement(s) will be awarded only to responsible and responsive Proposer(s) licensed and qualified by experience to do the work specified.

The Proposer shall submit, before the award of the Agreement, satisfactory evidence of experience in like work and that the Proposer is fully prepared with the necessary organization, capital, and equipment to complete the Scope of Services. Proposers shall be insured, and licensed by all applicable local, county, and state agencies.

**3.5 INSPECTIONS** Vendors shall supply a list of presently owned equipment. If the Proposer equipment becomes broken or needs repair, the Proposer shall strive to replace, or repair said equipment so there is no interruption in service. SCPA reserves the right to inspect Proposer's facilities and equipment before award and within 24 hours notification during the term of the Agreement.

**3.6 INITIAL AGREEMENT PERIOD AND AGREEMENT RENEWAL** The initial agreement shall be for three (3) years from the execution of the agreement. In addition, SCPA reserves the right to renew the agreement for two (2) additional one (1) year periods, providing that both parties agree that all terms, conditions, and specifications remain the same, contingent upon approval by SCPA.

**3.7 NEGOTIATIONS** Agreement(s) may be awarded based on offers received, without discussion. Therefore, quotes should contain the Proposer's best terms. There will not be negotiations after the Quotes are received.

**3.8 AGREEMENT AWARD** The Agreement award, if any, shall be made to the Proposer whose quote shall be deemed by SCPA to be in the best interest of SCPA. The decision of SCPA to make the award and which quote is in the best interest of SCPA shall be final.

**END OF SECTION**

## SECTION 4.0 QUESTIONNAIRE

Proposer shall provide all questions and answers on official letterhead.

- 1) How many years has your firm been in business under its present business name, and where is your printing site located?
- 2) Summary of Qualifications & Experience and Key Personnel. Who will be the designated account executive, project manager, and in-house designers/programmers? How long have they been with your organization? Including your approach to meeting requirements of printing, mailing, and delivery of service to your customers.
- 3) Previous Projects: provide highlights of your previous relevant work experience, including examples of other materials printed in the past 2 years.
- 4) Explain your contingency plans. In the event of an emergency or disaster, how would you proceed with status reporting, interfacing with the SCPA staff, internal project management, and quality assurance?
- 5) Can your organization, process, print, and mail, where necessary all Jobs in the RFQ, and store and track the inventory of these items within the timelines provided?
- 6) Can your organization work with MS Word, MS Access, MS Publisher, Adobe InDesign, Adobe Illustrator, and PDF file formats? Provide a list of data file types/formats your organization will accept (i.e., flat file delimited, MS Access, Excel, ASCII, etc.).
- 7) Does your organization have experience with high volume, 300,000+ items for mass mailings?
  - a) If yes, does the experience include mass mailing print jobs for a Florida Property Appraiser office? [if yes, include the county in your response]
  - b) If you have not had any Florida Property Appraiser customers in the past 12 months, provide examples of past productions with similar quantities along with references for such projects.
  - c) Does your organization have on-site capacity to print the high-volume TRIM project as specified in Job #9 in this RFQ?
  - d) Is your organization able to provide 24-hour-per-day printing and mailing services for the TRIM project, Job #9 in this RFQ? In your answer, note the on-site laser capacity of pages per hour.
  - e) Can your organization digitally track and insert multiple TRIM Notices with a common name and address into the same envelope, per Job #9 Specifications?
- 8) Summary of minimum turnaround time and delivery capabilities and indicate if you can turn around digital sample sets in PDF within a 24 to 48-hour window.
- 9) Will all components of our jobs/projects be produced at your facility? If not, which components would you expect to be subcontracted and with whom?
- 10) List equipment used for functional, mass mailing projects. (sorters, inserters, etc.)

11) List any items within this RFQ with which the Proposer takes exception or is unable to comply. Also clarify the same in the quoted sections, as applicable.

12) Have any similar agreements held by the Proposer for similar RFQs of mass print volume mailings ever been canceled? If yes, please explain:

a) Has the Proposer or any principals of the firm failed to qualify as a responsible Proposer, refused an award after it has been made, failed to complete an agreement during the past five (5) years, or been declared to be in default in any agreement in the last five (5) years? If yes, please explain:

b) Has your firm been debarred or suspended from Proposing, Contracting, Quoting, or responding to any solicitation for procurement by a government entity during the last five (5) years? If yes, please explain:

**END OF SECTION**

## SECTION 5.0 SCOPE OF SERVICES

**5.1 PURPOSE** To process, print, and mail various forms, letters, envelopes, notices, and buck slips to taxpayers at specific times during the year per the specifications; match our address records with customer-filed change-of-address orders maintained by the United States Postal Services (USPS) using the National Change of Address Linkage System (NCOALink) to meet USPS Move Update Standards; match our data provided addresses using Coding Accuracy Support System (CASS)-certified software to meet the USPS Zip Code Accuracy Standards.

**5.2 VENDOR ACCOUNT REPRESENTATIVES** The vendor shall designate a Project Manager and an alternate. The designated Project Manager must have the authority to make timely decisions and manage day-to-day operations for print jobs, confirm schedules for printings and mailings, relay drafts, and design changes. The vendor may change representatives at their discretion with advanced written notification to SCPA.

**5.3 SCPA REPRESENTATIVES** SCPA's Projects and Communication Coordinator will manage day-to-day operations for print jobs, confirm schedules for printings and mailings, relay drafts and design changes, and approve proofs to the vendor's project manager.

SCPA's Information Technology team will prepare data for delivery for mailings to the vendor.

SCPA representatives may not approve change orders for pricing or unit costs; however, change orders arising from significant changes to print specifications may arise during the term of the award. Additional costs, arising from such events must be mutually agreed upon and confirmed with signatures by authorized vendor representation and SCPA, also confirmed with a purchase order from SCPA Finance to be deemed binding.

SCPA may, at any time, by written order, make changes to the Proposer's obligations or methods of performance within the general scope of this agreement. If any change causes an increase or decrease in work to be performed under this agreement, the SCPA may make an equitable adjustment in the fixed price amount, the fee rate structure, the performance schedule, or other affected terms, as appropriate and may make written modifications to this agreement.

The Proposer must assert its right to an adjustment under this clause in writing within ten (10) calendar days from the date of receipt of the written order. The Proposer's non-response to the SCPA's written order shall be deemed as an acceptance by the Proposer, with no necessary modification to this agreement.

**5.4 PRINT JOBS SCOPE OF WORK** Each of the 9 print jobs has specifications outlined in this section of this RFQ and includes the following scope of work.

Receive SCPA documents/data via electronic means inclusive of preparing and readying for processing of print materials using vendor print programs to consume SCPA data.

After receipt of SCPA data, match address records using NCOALink for all mailings specified and provide electronic ready-to-consume pipe delimited or .csv reports, at least bi-annually **before mailings go to the USPS.**

Accept receipt of SCPA data and match address records using CASS-certified software, and provide electronic ready-to-consume pipe delimited reports, at least bi-annually **before mailings go to the USPS.**

Digital merging and programming are required to match variable data fields to SCPA-approved templates to create final print products. Including programming such as creating bar codes for Intelligent Mail, creating a bar code (linear and matrix) from a combination of numerical/alpha data provided and placing a bar code image on proof, or replicating a QR Code on a proof that it is readable by a smartphone on select jobs, as needed.

Mailing Addresses must be formatted to eliminate blank lines in the name/address fields.

Replication of the draft samples and process proofs/samples/drafts may be necessary for each project according to the specifications and timelines.

SCPA templates for print jobs are subject to change at least annually, and from time to time—signatory changes or content of the template and programming may be required during the agreement, programming is deemed to be included in unit pricing.

Printing of materials according to the specifications, including size, color, weight, timeline, and any other print job specifications.

Perform quality assurance during all phases and stages of the printing and mailings.

Store materials and documents listed in a climate-controlled location.

Maintain an inventory of print materials and documents produced.

Mailings must be presorted, materials inserted in a SCPA envelope where appropriate, and sealed and in compliance with USPS Regulations and marking international envelopes as needed. Items with the same owner name/s and mailing address shall be combined in one envelope.

Deliver the Print and Mail Project to the nearest USPS office by the specified mail date, and make notification of confirmation of the project mailing date to SCPA for each job.

When not subject to USPS delivery to a third-party address, print materials where indicated are delivered to SCPA.

**5.4 REQUIRED PRINT JOBS & TIMELINE** This table lists the print deliverables (jobs) and timing under this RFQ. Full print specifications are detailed under jobs starting with section 5.6.

REQUIRED PRINT AND MAIL PROJECTS						
Print Job	Print Project Ref #	Print and Mail Projects Description	Estimated Annual Quantity	Timing of Delivery	USPS Mail	SCPA
1	AO-060	AG Classification Packet	575	On or before January 1st	✓	
	AO-061	DR499 AG Classification Card	575	On or before January 1st	✓	
2	AO-062	DR499R AG Receipt Card	575	On or before January 1st		✓
3	AO-020	Commercial I&E Letter	8,500	Mid-January	✓	
4	AO-010	Residential Substantially Complete Letter	3,000	April	✓	
5	AO-090	Sales Qualification Letter (SQA)	20,000	Twice monthly (approx. 830 p/ mailing)	✓	
		Homestead Exemption Buck Slip	8,400		✓	
6	TP-010	DR405 Tax Return Letter	5,200	On or before January 1st	✓	
7	EX-010	SCPA500AR HX Renewal Card	125,000	On or before February 1st	✓	
8	EX-020	DR498 Organizational Renewal Card	1,300	On or before February 1st	✓	
9	AD-001	TRIM Notice	310,000	Mid-August	✓	
		TRIM Supplement	265,000		✓	

**5.5 REQUIRED PRINT JOBS** This table lists the envelope specifications used by print job numbers under this RFQ in section 5.4, and estimated quantities for each job. *Full print specifications are detailed under jobs starting with section 5.6 thru 5.13.*

<b>ENVELOPES REQUIRED FOR PRINT AND MAIL PROJECTS</b>			
<b>Envelope Project Ref #</b>	<b>Envelope Specifications</b>	<b>Used in Print Job #</b>	<b>Estimated Quantity</b>
<b>A</b>	Return envelope, Business Reply Mail (24# white, Size 9, w/indicia, 1/0)	<b>3</b>	8,500
		<b>5</b>	20,000
<b>B</b>	Return Envelope (24# white, Size 10, 1/0)	<b>1</b>	575
<b>C</b>	SCPA Official Business window envelope (24# white, Size 10, 1/0)	<b>3</b>	8,300
		<b>4</b>	3,000
		<b>5</b>	20,000
		<b>6</b>	5,200
<b>D</b>	SCPA Window Envelope, Official Business (28# white, 9 x 12 catalog, 1/0)	<b>1</b>	575
		<b>3</b>	200
<b>E</b>	TRIM Window Envelope (24# white, Size 10, 1/0)	<b>9</b>	265,000
<b>F</b>	TRIM Window Envelope (28# white, 9 x 12 catalog, 1/0)	<b>9</b>	1,000



**5.6 Print and Mail Project Specifications Job 1 & 2**

Job	Print & Envelope Project Ref#	Print and Mail Project Specifications	Estimated Annual Quantity	Timing of Delivery	USPS Mail	SCPA
1	AO-060	AG Classification Packet Letter (4-page, 60# white, one-sided letter, 8 ½ x 11, 1/0)	575	On or before January 1st	✓	
	AO-061	DR499 AG Classification Card (80# light green, cover stock, 4"x7"w, 2/1)	575	On or before January 1st	✓	
	B	Return Envelope (24# white, Size 10, 1/0)	575	On or before January 1st	✓	
	D	SCPA Envelope, Official Business (28# white, 9 x 12 catalog, 1/0)	575	On or before January 1st	✓	
2	AO-062	DR499R AG Receipt Card (80# light green, cover stock, 4"x7"w, 1/1)	575	On or before January 1st		✓

**Job 1:** For each **SCPA Envelope, Official Business (28# white, 9 x 12 catalog, 1/0)** vendor shall insert the following: **Ag letter (4-page, 60# white, one-sided letter, 8 ½ x 11, 1/0)** consisting of a one-sided cover sheet for catalog envelope with mailing address (grouped by same owner name/ mailing address); with three additional pages, a one-sided cover letter and two one-sided Ag supplements\*.

Together with the **DR499 AG Classification Card (80# light green, cover stock, 4"x7"w, 2/1)** and **Return Envelope (24# white, Size 10, 1/0)**.

**Job 2:** For each Ag packet data provided, a corresponding **DR499R AG Receipt Card (80# light green, cover stock, 4"x7"w, 1/1)** shall be provided by delivery to SCPA.

SCPA provides Ag Letter in MS Word and all Ag supplements in MS Excel or PDF, both with identified data variables, as a template form on an annual basis. DR-499 and DR-499R will be provided in PDF. Data variables are provided to the Proposer in Access, Excel, or flat file delimited. \*Ag supplements required for each envelope are dependent upon the Department of Revenue (DOR) Use Code provided in the Data file.

**Return Service Requested:** Yes    **CASS Standard Address:** Yes

**NCOA:** Yes

**5.7 Job 3 Print and Mail Project Specifications**

Job	Print & Envelope Project Ref#	Print and Mail Project Specifications	Estimated Annual Quantity	Timing of Delivery	USPS Mail	SCPA
3	AO-020	Commercial I&E Letter (1-page, 60# text, white, 8 1/2" x 11", 1/0)	8,500	Mid-January	✓	
	C	SCPA Official Business window envelope (24# white, Size 10, 1/0)	8,300	Mid-January	✓	
	D	SCPA Envelope, Official Business (28# white, 9 x 12 catalog, 1/0)	200	Mid-January	✓	
	A	Return envelope, Business Reply Mail (24# white, Size 9, w/indicia, 1/0)	8,500	Mid-January	✓	

**Job 3:** For each **Commercial I&E Letter (1-page, 60# text, white, 8 1/2" x 11", 1/0)**, the envelope size depending on quantity of groupings (same owner/mailing address), either **SCPA Envelope, Official Business (28# white, 9 x 12 catalog, 1/0)** or **SCPA Official Business window envelope (24# white, Size 10, 1/0)**; together with the **Return envelope, Business Reply Mail (24# white, Size 9, w/indicia, 1/0)**.

SCPA provides the Commercial I&E Letter in MS Word with identified data variables, annually. Data variables are provided to the Proposer in Access, Excel, or flat file delimited.

**Return Service Requested:** No      **CASS Standard Address:** Yes

**NCOA:** Yes

**5.8 Job 4 Print and Mail Project Specifications**

Job	Print & Envelope Project Ref#	Print and Mail Project Specifications	Estimated Annual Quantity	Timing of Delivery	USPS Mail	SCPA
4	AO-010	Substantially Complete Letter (1 page, 60# text, white, 8 1/2" x 11", 1/0)	3,000	April	✓	
	C	SCPA Official Business window envelope (24# white, Size 10, 1/0)	3,000	April	✓	

**Job 4:** Each **Substantially Complete Letter (1 page, 60# text, white, 8 1/2" x 11", 1/0)** is mailed in a **SCPA Official Business window envelope (24# white, Size 10, 1/0)**.

SCPA provides Substantially Complete Template Letters in MS Word with identified data variables. Data variables are provided to the Proposer in Access, Excel, or flat file delimited.

**Return Service Requested:** No      **CASS Standard Address:** Yes  
**NCOA:** Yes

### 5.9 Job 5 Print and Mail Project Specifications

Job	Project Ref#	Print and Mail Project Specifications	Estimated Annual Quantity	Timing of & Delivery	USPS Mail	SCPA
5	AO-090	Sales Qualification Letters (1 page, 2-sided, 60# text, white, 8 1/2" x 11", 1/0)	830 per with approx 20,000 per annum	Twice per month (approx. 830 p/mailing)	✓	
	AO-090	Homestead Exemption Buck Slip Residential Parcels Only (1/3 page, 2-sided, 60# glossy text, color, 4/4)	8,400			
	C	SCPA Official Business window envelope (24# white, Size 10, 1/0)	830 per with approx 20,000 per annum			
	A	Return envelope, Business Reply Mail (24# white, Size 9, w/indicia, 1/0)	830 per with approx 20,000 per annum			

**Job 5:** Each **Sales Qualification Letter (1 page, 2-sided, 60# text, white, 8 1/2" x 11", 1/0)** is mailed in a **SCPA Official Business window envelope (24# white, Size 10, 1/0)** with a **Return envelope with Business Reply Mail (24# white, Size 9, w/indicia, 1/0)**.

Residential property only requires the **Homestead Exemption Buck Slips, (Residential Parcels Only, 1/3 page, 2-sided, 60# glossy text, color, 4/4)** not used for Commercial property. Buck slip volume varies, based on Residential Property volume- *it is suggested to print on demand based on actual volume.*

SCPA provides the annual templates for Sales Qualification Letters by property type (residential and commercial) in MS Word with identified data variables using two templates, with specific codes determining the property type.

Data variables are provided to the Proposer in Access, Excel, or flat file delimited.

**Return Service Requested:** No      **CASS Standard Address:** Yes  
**NCOA:** Yes

**5.10 Job 6 Print and Mail Project Specifications**

Job	Project Ref#	Print and Mail Project Specifications	Estimated Annual Quantity	Timing of Delivery	USPS Mail	SCPA
6	TP-010	DR405 Tax Return Letter (60# text, white, 8 1/2" x 11", 1/0)	5,200	On or before January 1st	✓	
	C	SCPA Official Business window envelope (24# white, Size 10, 1/0)	5,200	On or before January 1st	✓	

**Job 6:** Each **Tax Return Letter (1 page, 60# text, white, 8 1/2" x 11", 1/0)** is mailed in a **SCPA Official Business window envelope (24# white, Size 10, 1/0)**.

SCPA provides a Tax Return Letter in MS Word with identified data variables. Data variables are provided to the Proposer in Access, Excel, or flat file delimited.

**Return Service Requested:** Yes      **CASS Standard Address:** Yes  
**NCOA:** No

**5.11 Job 7 Print and Mail Project Specifications**

Job	Project Ref#	Print and Mail Project Specifications	Estimated Annual Quantity	Timing of Delivery	USPS Mail	SCPA
7	EX-010	SCPA 500AR HX Renewal Card (white, 80# cover stock, 8"x 6"w, perf, 2/2)	125,000	On or before February 1st	✓	

**Job 7:** For each perforated card, **SCPA 500AR HX Renewal Card (white, 80# cover stock, 8"x 6"w, perf, 2/2)**, with two color text (black and red). Vendor to fold and adhere clear tabs to seal postcards.

SCPA provides SCPA 500AR HX in MS Publisher or PDF with identified data variables. Data variables are provided to the Proposer in Access, Excel, or flat file delimited.

**Return Service Requested:** Yes    **CASS Standard Address:** Yes

**NCOA:** Provide a database of NCOA records to SPCA only, not on mailings.



### 5.13 Job 9 Print and Mail Project Specifications

Job	Project Ref#	Print and Mail Project Specifications	Estimated Annual Quantity	Timing of Delivery	USPS Mail	SCPA
9	AD-001	TRIM Notice (24# white bond, white, 8 1/2" x 11", 4/4, with color)	310,000	Mid-August	✓	
	AD-001	NCOA Buck Slip** (Homestead Parcels Only, 1/3 page, 2-sided, 60# glossy text, color, 4/4)	6,000	Mid-August	✓	
	AD-001	TRIM Supplement (24# white bond, 11" x 17", 4/4)	265,000	Mid-August	✓	
	E	TRIM window envelope (24# white, Size 10, 1/0)	265,000	Mid-August	✓	
	F	TRIM window—multi (28# white, 9 x 12 catalog, 1/0)	2,000	Mid-August	✓	

**Job 9:** For each **TRIM Notice (24# white bond, white, 8 1/2" x 11", 4/4, with color)** vendor shall insert the following: **TRIM Supplement (24# white bond, 11" x 17", 4/4)** with double-sided print, folded in half as a booklet and then tri-folded for insertion into the envelope, the envelope size depending on quantity of groupings (same owner/ mailing address), either **TRIM window—multi (28# white, 9 x 12 catalog, 1/0)** or **TRIM window (24# white, Size 10, 1/0)**.

\*\*For Homestead parcels only, the proposed vendor will identify each mailing address that has an active NCOA record of moved and insert the **NCOA Buck Slip** in that mailing where SCPA has indicated it as a homestead parcel.

Groupings (same owner/ mailing address) To reduce postage expense, multiple TRIM Notices of five (5) or more addressed to the same owner at the same address shall be mailed in catalog envelopes or flats with one (1) TRIM Supplement. *Flats, when used for mailing are to be provided at no additional charge.*

SCPA TRIM Notice sample form delivered to the vendor in PDF format; the form contains fixed and variable data. The variable data must be merged from various tables provided by SCPA.

**SCPA TRIM Supplement** work is expected to be completed in early May and delivered to the vendor in MS Publisher and PDF format. The vendor will need to insert a digital image of the TRIM into the TRIM supplement before printing. Color match required. The colors used in the printed supplement must match the colors used in the draft provided by SCPA. Subject to final approval by SCPA.



### 5.13 Job 9 Print and Mail Project Specifications (Continued)

Data file provided to Proposer in MS Access or flat file delimited.

**Due to the high print volume, this project requires early planning and preparation for the envelopes and the inserts- TRIM supplements and NCOA buck slip.**

**Also, for the TRIM Notice a required minimum of the proof, and 2 sample data sets plus a live production sample with strict deadlines between July 1 and August 10.**

**Ready for Mailing Deadline:** All materials must be sealed and ready for mailing at the USPS office within **seven (7) business days of receiving final live data from SCPA.** (Historically, final data has been delivered to Proposer between 8/8 – 8/11)

**Return Service Requested:** No, Forward Service Requested

**CASS Standard Address:** Yes, and provide all records to SCPA before or at LIVE Print

**NCOA:** Yes, and provide all records to SCPA before or at LIVE Print

**End of section.**

## PRICE QUOTE FORM

Postage shall be paid by the SCPA and shall NOT be included in the unit price. For each year, provide the project unit price, excluding postage, for processing, preparing, printing, and mailing the documents for each project per the SCPA specifications in this Invitation for Quote.

State of Florida Sales Tax - the SCPA is tax-exempt, do not include it in the quote.

Job	Project Ref #	Print and Mail Project Description	Estimated Annual Quantity	Unit Price YEAR 1	Unit Price YEAR 2	Unit Price YEAR 3
<b>1</b>	<b>AO-060</b>	AG Classification Packet AG Letter (4-page, 60# white, one-sided letter, 8 ½ x 11, 1/0)	575			
	<b>AO-061</b>	DR499 AG Classification Card (80# light green, cover stock, 4"x7"w, 2/1)	575			
	<b>B</b>	Return Envelope (24# white, Size 10, 1/0)	575			
	<b>D</b>	SCPA Envelope, Official Business (28# white, 9 x 12 catalog, 1/0)	575			

Job	Project Ref #	Print and Mail Project Description	Estimated Annual Quantity	Unit Price YEAR 1	Unit Price YEAR 2	Unit Price YEAR 3
<b>2</b>	AO-062	DR499R AG Receipt Card (80# light green, cover stock, 4"x7"w, 1/1)	575			

Job	Project Ref #	Print and Mail Project Description	Estimated Annual Quantity	Unit Price YEAR 1	Unit Price YEAR 2	Unit Price YEAR 3
<b>3</b>	AO-020	Commercial I&E Letter (1-page, 60# text, white, 8 1/2" x 11", 1/0)	8,500			
	<b>C</b>	SCPA Official Business window envelope (24# white, Size 10, 1/0)	Varies			
	<b>D</b>	SCPA Envelope, Official Business (28# white, 9 x 12 catalog, 1/0)	Varies			
	<b>A</b>	Return envelope, Business Reply Mail (24# white, Size 9, w/indicia, 1/0)	8,500			

Price Quote Form (continued)

Job	Project Ref #	Print and Mail Project Description	Estimated Annual Quantity	Unit Price YEAR 1	Unit Price YEAR 2	Unit Price YEAR 3
4	AO-010	Substantially Complete Letter (1 page, 60# text, white, 8 1/2" x 11", 1/0)	3,000			
	C	SCPA Official Business window envelope (24# white, Size 10, 1/0)	3,000			

Job	Project Ref #	Print and Mail Project Description	Estimated Annual Quantity	Unit Price YEAR 1	Unit Price YEAR 2	Unit Price YEAR 3
5	AO-090	Sales Qualification Letters (1 page, 2-sided, 60# text, white, 8 1/2" x 11", 1/0)	20,000			
	AO-090	Homestead Exemption Buck Slip Residential Parcels Only (1/3 page, 2-sided, 60# glossy text, color, 4/4)	8,400			
	C	SCPA Official Business window envelope (24# white, Size 10, 1/0)	20,000			
	A	Return envelope, Business Reply Mail (24# white, Size 9, w/indicia, 1/0)	20,000			

Job	Project Ref #	Print and Mail Project Description	Estimated Annual Quantity	Unit Price YEAR 1	Unit Price YEAR 2	Unit Price YEAR 3
6	TP-010	DR405 Tax Return Letter (60# text, white, 8 1/2" x 11", 1/0)	5,200			
	C	SCPA Official Business window envelope (24# white, Size 10, 1/0)	5,200			

Price Quote Form (continued)

Job	Project Ref #	Print and Mail Project Description	Estimated Annual Quantity	Unit Price YEAR 1	Unit Price YEAR 2	Unit Price YEAR 3
7	EX-010	SCPA 500AR HX Renewal Card (white, 80# cover stock, 8"x 6"w, perf, 2/2)	125,000			

Job	Project Ref #	Print and Mail Project Description	Estimated Annual Quantity	Unit Price YEAR 1	Unit Price YEAR 2	Unit Price YEAR 3
8	EX-020	DR498 Organizational Renewal Card (80# cover stock, yellow, 8"x 6"w, perf, 2/2)	1,300			

Job	Project Ref #	Print and Mail Project Description	Estimated Annual Quantity	Unit Price YEAR 1	Unit Price YEAR 2	Unit Price YEAR 3
9	AD-001	TRIM Notice (24# white bond, white, 8 1/2" x 11", 4/4, with color)	310,000			
	AD-001	NCOA Buck Slip (Homestead Parcels Only, 1/3 page, 2-sided, 60# glossy text, color, 4/4)	7500			
	AD-001	TRIM Supplement (24# white bond, 11" x 17", 4/4)	265,000			
	E	TRIM window envelope (24# white, Size 10, 1/0)	265,000			
	F	TRIM window—multi (28# white, 9 x 12 catalog, 1/0)	1,000			

Submitted by: \_\_\_\_\_ of \_\_\_\_\_

Date: \_\_\_\_\_

## PROPOSER CHECKLIST

**RFQ 2024 -001 CHECKLIST** The following are the requirements of this RFQ, as indicated below.

Place a checkmark in the "Done" column as you complete and enclose each item.		
Required	Done	Requirement
√		Quote Cover Page
√		Acknowledgment of Addenda (if applicable)
√		Completed and Signed Quote Form
√		Proposer Questionnaire Responses (on business letterhead)
√		Print Samples or Examples of Comparable Print Materials
√		Licenses and/or Certifications (if applicable)
√		Proof of Insurance
√		Business Tax Receipt [Occupational License(s)]
√		State of FL Sunbiz Registration
√		IRS Form W-9
<i>This checklist is for your guidance. Please read the entire RFQ thoroughly to ensure that your submission is complete.</i>		

**SARASOTA COUNTY PROPERTY APPRAISER RFQ 2024-01 QUOTE COVER PAGE**

This signed sheet must be returned with your proposal as the cover page.

**PROPOSER:**

1. The undersigned is duly authorized to act on behalf of the Proposer and is designated to submit this proposal.
2. The undersigned understands that a person or affiliate who has been placed on the convicted vendor list, by Section 287.133, Florida Statutes, may not submit a proposal.
3. To be considered for selection, it is agreed that the Proposer must submit a complete response to this request for a quote.
4. In submitting this proposal, it is agreed that the SCPA reserves the right to waive informalities and to reject any and all proposals.
5. Attached hereto and made a part of this proposal is all of the information required by or requested in the RFQ.

NOTICE: This signed proposal form shall be considered an offer on the part of the proposer. Failure to sign this form is grounds for immediate disqualification. By signing this document, you are affirming that you have read and understood the terms, conditions, and information included within this solicitation. All the information provided above is true and accurate. You have the proper authority to sign this document and the ability to bind this business entity to the terms and conditions herein.

Authorized Signature \_\_\_\_\_

Printed Name, Title \_\_\_\_\_

Date \_\_\_\_\_

Proposer \_\_\_\_\_

Mailing Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

Is the Proposer licensed to do business in the State of Florida? \_\_\_\_ yes \_\_\_\_ no

**SCPA SAMPLE CONTRACT: SCPA RFQ #2024-01**

This agreement is made between [Awarded Vendor Name Here] and the Sarasota County Property Appraiser (SCPA) to set out the terms and conditions under which [Awarded Vendor Name Here] will provide printing and mailing services to the Sarasota County Property Appraiser.

**Scope of Services**

[Awarded Vendor Name Here] will be responsible for print projects as outlined in the attached RFQ and award.

Except for \_\_\_\_\_.

If jobs/projects are added, deleted, or modified based on legislative, technological, or procedural changes, this contract may be amended to incorporate the changes.

**Agreement** the intent and content of the RFQ, the RFQ attachments, addenda, and appendices, and the responses provided by [Awarded Vendor Name Here] are fully incorporated as attachments to this contract.

**Confidentiality** [Awarded Vendor Name Here] agrees, at all times, to exercise caution and discretion in safeguarding the Sarasota County Property Appraiser’s information and data.

**Payment and postage costs** will be paid by the Sarasota County Property Appraiser within 30 days of the completion of each printing & mailing project provided the vendor has issued an accurate written invoice with statistical verification of the charges including the postage expense statements.

**Term of Contract** will be for a term of three years and may be renewed for up to two additional years at the option of the Sarasota County Property Appraiser. The contract term will begin in [MM/DD/YYYY]. The Sarasota County Property Appraiser reserves the right to cancel this contract with 30 days written notice. The Sarasota County Property Appraiser will remain obligated to pay for services rendered before such termination.

[Awarded Vendor Name Here] and the Sarasota County Property Appraiser agree to work together to ensure that the printing and mailing projects are completed accurately, efficiently, and in the time frames identified. Each party agrees to cooperate, deal honestly and fairly with the other, and faithfully comply with this agreement.

[Awarded Vendor Name Here] and the Sarasota County Property Appraiser agree to be bound by the terms and conditions contained in this agreement, and have affixed authorized signatures below:

Vendor: [Awarded Vendor Name Here]	Sarasota County Property Appraiser
By:	By:
Title:	Title:
Date:	Date:

*No amendment to this agreement shall be valid unless signed by both parties.*

**IMPORTANT:** A signature is not required with the RFQ Submittal. Upon RFQ Award SCPA will sign, date, and submit the complete agreement to the vendor for signature.

## APPENDIX – PRINT SAMPLE PACKETS BY JOB and ENVELOPE



# **JOB #1 AG CLASSIFICATION PACKET**

3 H RANCH LLC  
NORMAN & CAROL HALES TR FOR AUDRA LEIGH HALES  
C/O JOHN HALES  
1958 SW 28TH AVE  
OKEECHOBEE FL 34974-5586



**Bill Furst**  
**SARASOTA COUNTY PROPERTY APPRAISER**

2001 Adams Lane, Sarasota, FL, 34237 | Ph: 941.861.8200 | F: 941.861.8260 | [www.sc-pa.com](http://www.sc-pa.com)

December 29, 2023

Dear Property Owner:

Section 193.461, Florida Statutes, requires the Property Appraiser to annually classify, for assessment purposes, all lands within the county as either agricultural or non-agricultural.

For those lands classified as agricultural, three approaches are available to the Property Appraiser for determining an equitable assessment. They are the cost approach, market approach, and income approach. Although each approach is considered, agricultural lands are income-producing properties; therefore, the greatest emphasis is placed on the income approach.

Capitalizing a net income computes an assessment from this approach. The net income is the result of deducting expenses from gross income. Therefore, the accuracy of the assessment for your property depends on the validity of the income and expense information used to compute the net income. The quality and availability of the income and expense information lie entirely with you: the owner/operator of the agricultural endeavor. Only you know the actual costs, the productivity, and the income received from this productivity.

Please be advised that this office considers income and expense information confidential. You may be assured that we will store and process it as such. It would be to your benefit to join this office in its efforts to assign an equitable assessment to your property by providing the above information as soon as possible.

Also, please be advised that under the provisions of Section 194.034, Florida Statutes, a petitioner is prohibited from using information requested and not received by this office before the Special Master or Value Adjustment Board to support a petition contesting a conclusion of value.

If you have any questions related to the above, please contact us by phone at 941-861-8200, email [AG@sc-pa.com](mailto:AG@sc-pa.com) or visit our web page for more information on agricultural classifications<sup>1</sup>.

Respectfully,

Bill Furst, CFA  
Sarasota County Property Appraiser

<sup>1</sup> <https://www.sc-pa.com/exemptions/other-exemptions/agriculture-classification/>

# INCOME & EXPENSE STATEMENT FOR GROVES

(Information supplied on this form is CONFIDENTIAL)

GROVE OWNER: \_\_\_\_\_

YEAR: \_\_\_\_\_

## INCOME

	ROUND ORANGE	VALENCIA	GRAPEFRUIT	other: _____
TOTAL ACRES				
AGE				
TREES PER ACRE				
BOXES PER TREE				
PRICE PER BOX				
TOTAL GROSS INCOME				

## COST OF PRODUCTION

GROVE PRACTICE	UNIT	AVG COST	TOTAL COST	GROVE PRACTICE	UNIT	AVG COST	TOTAL COST
<b>CULTIVATION:</b>				<b>REMOVING TREES:</b>			
Hand Hoe	Hr.			Pulling Trees Tractor	Hr.		
Machine Hoe	Hr.			Bulldozer	Hr.		
Rotavate	Hr.			Front End Loader	Hr.		
Disc. 7'	Acre			<b>GENERAL PRUNING:</b>	Hr.		
Disc. 9'-10'	Acre			<b>HEDGING:</b>			
Chop	Acre			Side by Side	Hr.		
Mow	Hr.			Double Side	Hr.		
Herbicide	Acre			<b>TOPPING:</b>	Hr.		
Plow	Hr.			<b>REMOVE BRUSH:</b>			
Vine Puller	Hr.			Haul out of Grove	Hr.		
<b>SPRAYING:</b>				Bush Hog-Brush Hog-Cho	Hr.		
Hand Sprayer	Hr.			Mow (Brush Cutter)	Hr.		
Hand Sprayer	Tank			<b>COLD PROTECTION:</b>			
Ag.Tech Spray	Tank			Stand-by	Hr.		
Span Sprayer	Acre			Per Man	Nite		
Boom Sprayer	Tank			Firing	Hr.		
<b>DUSTING:</b>				Per Man	Nite		
Ground Application	Acre			<b>BANKING &amp; UNBANKING:</b>			
Aerial Application	Acre			Hand Labor	Hr.		
<b>FERTILIZING:</b>				Mechanical	Hr.		
Dry (Bag)	Acre			<b>OTHER RATES:</b>			
Dry (Bulk)	Acre			Truck with Driver	Hr.		
Liquid	Acre			Tractor with Driver	Hr.		
Lime & Dolomite	Acre			Powersaw with Oper.	Hr.		
Fertigation	Acre			Powersaw w/o Oper.	Hr.		
<b>FERTILIZING YNG. TREES:</b>				Plant trees (per man)	Hr.		
Hand Labor	Hr.			Mechanic Labor	Hr.		
Fert. Spreader	Hr.			<b>Pick &amp; Haul:</b>	Box		
<b>IRRIGATION:</b>							
Permanent Overhead	Acre						
Perforated Pipe	Acre						
Micro-Jet	Acre						

Grove Maintenance under Contract with: \_\_\_\_\_ Amount: \_\_\_\_\_

**INCOME & EXPENSE STATEMENT FOR HORSE BREEDING**  
 (Information supplied on this form is CONFIDENTIAL)

Breeder: \_\_\_\_\_  
 Breed: \_\_\_\_\_  
 Year: \_\_\_\_\_

**Income**

	<u>Number</u>	<u>Avg. Income</u>	<u>Total Income</u>
Sale of Horses:			
Stud Fees:			
Other Income:			

**Expenses**

	<u>Unit</u>	<u>Number</u>	<u>Unit Price</u>	<u>Total Price</u>
Feed: Avg. _____ lbs. per day per horse	Lbs.			
Hay: Avg. _____ lbs. per day per horse for _____ days	Rnd. Bales			
	Sq. Bales			
Stud Fees	N/A			
Artificial Insemination Fees	Head			
Vet & Vet Supplies	Head			
Advertising	N/A			
Tack	N/A			
Hand Tools	N/A			
Supplies	N/A			
Labor (full time)	Week			
Labor (part time)	Hr.			
Farrier	Head			
Repair & Replacement Equipment	N/A			
Repair & Replacement Fences, Bldgs, etc.	N/A			
Legal & Accounting	N/A			
Dues & Subscriptions	N/A			
Insurance	N/A			
Mowing (Acres _____)	Hour			
Pasture Renovation ( Acres _____ )				
Type of grass seed _____	Lbs.			
Type of grass seed _____	Lbs.			
Roto-Plow	Hour			
Pasture Fertilization (Acres _____ )				
Analysis _____	Ton			
Analysis _____	Ton			
Other				

**INCOME / EXPENSE STATEMENT FOR RANCH OPERATION**  
**(Information Supplied on this form is CONFIDENTIAL)**

Ranch: \_\_\_\_\_  
 Calendar Year: \_\_\_\_\_ or Fiscal Year: \_\_\_\_\_ to \_\_\_\_\_

**INCOME:**

	Number	Weight	\$ per Lb	Amount
Cull Cows				
2 yr Heifers				
Light Heifer - Calves				
Light Steer - Calves				
Heavy Heifer - Calves				
Heavy Steer - Calves				
Bulls				

Timber \$ per Cord \_\_\_\_\_ Total Cords \_\_\_\_\_  
 Hunting Lease \$ per Acre \_\_\_\_\_ Total Acres \_\_\_\_\_  
 Sod (Bahia Pasture Grass) \$ per Acre \_\_\_\_\_ Total Acres \_\_\_\_\_  
 Other Income: \_\_\_\_\_

**EXPENSES:**

ITEM	UNIT	NUMBER	UNIT PRICE	TOTAL PRICE
Molasses (Avg Lbs _____ for _____ days)	Ton			
Minerals:	Ton			
Hay: (Avg Lbs _____ for _____ days)	Bales Sqr			
	Bales Rnd			
Vet and Vet Supplies:	Head			
Hand Tools:				
Horse Feed: (Avg Lbs _____ per day for _____ horses)	Lbs.			
Cow Feed:	Lbs.			
Labor: (Full Time)	Week			
Labor: (Part Time)	Hour			
Replacement Bulls:	Head			
Repair and Replacement - Equipment				
Repair and Replacement - Fences, Bldg. Etc				
Legal and/or Accounting:	Annual			
Dues:	Annual			
Travel Expenses:	Annual			
Insurance:	Annual			
Truck - cost of replacement after 4 yrs 25% per yr	Truck			
Mowing (# of Acres _____)	Hour			
Chopping (# of Acres _____)	Hour			
Pasture Renovation (# of Acres _____)				
Rye Grass Seed	Lbs.			
Bahia Grass Seed	Lbs.			
Roto-Plow	Hour			
Pasture Fertilization (# of Acres _____)				
Analysis _____	Ton			
Analysis _____	Ton			
Diesel Fuel	Gal.			
Other:				

**PRODUCTIVITY SUPPLEMENT TO DOR AG RENEWAL CERTIFICATION**

PROPERTY OWNER: \_\_\_\_\_ PHONE NUMBER: \_\_\_\_\_

The following information is required to determine the classified use and to calculate an equitable assessment for your property.

1) LIVESTOCK COUNT (Permanent Herd)  
 Cows \_\_\_\_\_  
 Heifers \_\_\_\_\_  
 Bulls \_\_\_\_\_  
 Horses \_\_\_\_\_  
 Other # \_\_\_\_\_ Type \_\_\_\_\_

2) FIELD CROPS:  
 Type \_\_\_\_\_ Acres \_\_\_\_\_  
 Type \_\_\_\_\_ Acres \_\_\_\_\_  
 Type \_\_\_\_\_ Acres \_\_\_\_\_

3) NURSERY:  
 In Pots \_\_\_\_\_ Acres \_\_\_\_\_  
 In Ground \_\_\_\_\_ Acres \_\_\_\_\_

4) TIMBER:  
 Planted \_\_\_\_\_ Acres \_\_\_\_\_  
 Native \_\_\_\_\_ Acres \_\_\_\_\_

5) HORSE BREEDING: Breed \_\_\_\_\_  
 Broodmares \_\_\_\_\_ Number \_\_\_\_\_  
 Studs \_\_\_\_\_ Number \_\_\_\_\_  
 \_\_\_\_\_ Acres \_\_\_\_\_

6) GROVE:  
 Early & Mids:  
 Age \_\_\_\_\_ Acres \_\_\_\_\_  
 Age \_\_\_\_\_ Acres \_\_\_\_\_  
 Age \_\_\_\_\_ Acres \_\_\_\_\_

Valencias:  
 Age \_\_\_\_\_ Acres \_\_\_\_\_  
 Age \_\_\_\_\_ Acres \_\_\_\_\_  
 Age \_\_\_\_\_ Acres \_\_\_\_\_  
 Grapefruit:  
 Age \_\_\_\_\_ Acres \_\_\_\_\_  
 Age \_\_\_\_\_ Acres \_\_\_\_\_  
 Age \_\_\_\_\_ Acres \_\_\_\_\_

Other Varieties:  
 Type \_\_\_\_\_  
 Age \_\_\_\_\_ Acres \_\_\_\_\_  
 Type \_\_\_\_\_  
 Age \_\_\_\_\_ Acres \_\_\_\_\_  
 Type \_\_\_\_\_  
 Age \_\_\_\_\_ Acres \_\_\_\_\_

7) OTHER:  
 Type \_\_\_\_\_ Acres \_\_\_\_\_

**If the property is leased to others, a current lease agreement must be made available to this office.**

I, THE UNDERSIGNED, DO HEREBY CERTIFY THAT THE STATEMENTS SHOWN IN THE ABOVE APPLICATION ARE TRUE TO THE BEST OF MY KNOWLEDGE AND BELIEF AS OF **JANUARY 1, 2024.**

DATE: \_\_\_\_\_ SIGNED: \_\_\_\_\_

**Sign and return on or before March 1, 2024**

TO: BILL FURST  
 SARASOTA COUNTY PROPERTY APPRAISER  
 2001 ADAMS LANE  
 SARASOTA, FL 34237  
 Phone (941) 861-8200

**BY LAW, ABSOLUTE DEADLINE FOR FILING IS MARCH 1.**

1  
-  
1

<b>Property Control No.</b>	0282004001
-----------------------------	------------

**Renewal Application For 2023**

Do you own Tangible Personal Property used in connection with the herein described property?     Yes     No

If yes, do you intend to file a Personal Property Return with the Property Appraiser this year?     Yes     No

Name and Address of Property Owner	3 H RANCH LLC NORMAN & CAROL HALES TR FOR AUDRA LEIGH HALE C/O JOHN HALES 1958 SW 28TH AVE OKEECHOBEE FL 34974-5586
------------------------------------	---

Legal Description	THAT PART OF SE 1/4 OF SEC 16-37-19 LYING S & W OF SUGAR BOWL RD & S 1/2 OF SW 1/4 OF SAID SEC 16, LESS LANDS DESC IN ORI 2015078646, SUBJ TO 113984 SF UTILITY ESMT TO SARASOTA COU
-------------------	--

I hereby apply for Agricultural or High Water Recharge Classification of lands as listed on the card As of January 1, of the year indicated on this card, the lands were primarily used for commercial agricultural purposes. I have examined all information printed on this card and hereby certify that it is correct.

\_\_\_\_\_ Date \_\_\_\_\_  
Signature

**Instructions - Read Carefully**

If property description, use of the land, acreage, etc. is correct as listed on this card, sign and date below; then bring or mail this card immediately to the Property Appraiser's Office. You will then be sent a receipt.

If any information is incorrect or if the use of the land has changed since last year, contact the Property Appraiser's Office immediately.

**Be sure to complete & sign below.**

**Please complete the information below**  
**The property herein described was on January 1st being used for a bona fide Agricultural or High-Water Recharge purpose.**

<input type="checkbox"/> Pasture	<input type="checkbox"/> High-water
<input type="checkbox"/> Citrus	Recharge
<input type="checkbox"/> Forestry	<input type="checkbox"/> Row Crop
<input type="checkbox"/> Other _____	
<input type="checkbox"/> Used By Owner	<input type="checkbox"/> By Lessee

If used by Lessee, Name \_\_\_\_\_

and Address of Lessee \_\_\_\_\_

Has property been rezoned to non-agricultural use at the request of owner?     Yes     No

**Affix postage on reverse side, mail before March 1.**





**Place  
Postcard  
Postage  
Here**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State Zip

**RENEWAL OF AGRICULTURAL OR HIGH-WATER RECHARGE CLASSIFICATION OF LANDS**

**BILL FURST  
SARASOTA COUNTY PROPERTY APPRAISER  
2001 ADAMS LN  
SARASOTA, FL 34237-7005**



# **JOB #2 AG CLASSIFICATION RENEWAL RECEIPT**

DR-499R (R. 06/91)

**BILL FURST**

SARASOTA COUNTY PROPERTY APPRAISER  
2001 ADAMS LANE  
SARASOTA, FL 34237-7005

**RECEIPT FOR 2024 AGRICULTURAL CLASSIFICATION  
APPLIED FOR ON THE PROPERTY DESCRIBED BELOW:**

0550003002

BEG AT SW COR OF SEC 23-36-20 TH N-0-14-51-W  
543.63 FT TH S-88-02 -23-E 481.12 FT TH  
S-0-14-51-E 543.63 FT TH N-88-02-23-W 481.12 FT TO  
POB CONTAINING 6 C-AC M/L

WYATT SANFORD L  
WYATT VIVIAN E  
4000 RUGER RANCH RD  
SARASOTA FL 34240-8811

THIS IS YOUR RECEIPT TO SHOW THAT YOU HAVE FILED A REQUEST  
FOR RENEWAL OF THE AGRICULTURAL CLASSIFICATION GRANTED  
LAST YEAR

YOU WILL BE NOTIFIED BY THE PROPERTY APPRAISER IF YOUR  
APPLICATION IS REJECTED

GIVING FALSE INFORMATION FOR THE PURPOSE OF RENEWING AN AGRICULTURE CLASSIFICATION IS PUNISHABLE BY LAW

# **JOB #3 COMMERCIAL I&E LETTER**



**Bill Furst**  
**SARASOTA COUNTY PROPERTY APPRAISER**

2001 Adams Lane, Sarasota, FL, 34237 | Ph: 941.861.8200 | F: 941.861.8260 | www.sc-pa.com

January 21, 2024

Owner Name  
Address 1  
Address 2  
Address 3  
City, State Zip Country

Account #/Parcel ID: Parcel ID  
Situs: situs address

Use Code: Property Use

Dear Property Owner,

It is the responsibility of the Sarasota County Property Appraiser’s Office to annually determine the market value of all real property in the county. To achieve the greatest possible accuracy in the valuation of income-producing properties, our office annually conducts an income and expense survey. The data collected will be used to develop typical appraisal parameters and valuation models for your property type.

We kindly request that you submit a year-end 2023 Income and Expense Statement, Rent Roll, and/or other pertinent Operating Statements. **This request is only for income associated with the rental of your property. Income generated by a business operation is not needed.** The information gathered will be used solely by the Property Appraiser’s Office and will be kept in strict confidence in accordance with Section 195.027, Florida Statutes, and will not be part of the public record.

Regarding your specific property’s valuation, please also provide any other information that you believe is relevant. This could include items such as extraordinary costs or conditions associated with the property. We would also welcome current listing or sales contract information or current market value appraisals made on the property for obtaining mortgage financing or establishing a sale price.

Please send us your response and supporting documents along with a copy of this letter by **April 1, 2024**. If you choose not to respond to this request, our office will use the best information available to appraise your property. To be fair to all property taxpayers, we reserve the right to object to the later submission of income data should you choose to challenge the appraised value.

If you have any questions, please contact the appraiser assigned to your property: Appraiser at Appraiser\_Phone or Appraiser\_Email. Thank you in advance for your cooperation.

Respectfully,

Wynnta Loughrey  
Commercial Valuation Manager

Contact Person \_\_\_\_\_ Phone \_\_\_\_\_

Please print

**JOB #4 RESIDENTIAL SUBSTANTIALLY COMPLETE LETTER**



# Bill Furst

## SARASOTA COUNTY PROPERTY APPRAISER

2001 Adams Lane, Sarasota, FL, 34237 | Ph: 941.861.8200 | F: 941.861.8260 | [www.sc-pa.com](http://www.sc-pa.com)

May 10, 2024

Owner Name  
Address 1  
Address 2  
Address 3  
City State Zip  
Country

RE: Account # «Account\_Number»

Dear Sir or Madam:

We recently inspected your property located at «LOCN» «LOCS» to determine whether the improvements have been completed. Based on this inspection and other information available to us, we have concluded that the improvements meet statutory requirements of substantially completed<sup>1</sup>. As a result, the market (just) value of the improvements will be reflected on the Notice of Proposed Property Taxes in August of this year.

Should you have any questions regarding our determination, please contact «Appraiser» at «Appraiser\_Phone» or APPRAISER EMAIL to discuss our findings and arrange a further inspection of the property if necessary. Conversely, should you have pertinent information to support the value of improvements I encourage you to share this information with our office.

**For owner-occupied residential units, a reminder on Homestead Exemption:** You must make an application to be considered for exemptions at this property, exemptions do not transfer.

Respectfully,

Tod Abrahamson  
Residential Valuation Manager

<sup>1</sup> §192.042, Florida Statutes, Date of assessment. —All property shall be assessed according to its just value as follows:  
(1) Real property, on January 1 of each year. Improvements or portions not substantially completed on January 1 shall have no value placed thereon. "Substantially completed" shall mean that the improvement or some self-sufficient unit within it can be used for the purpose for which it was constructed.



# **JOB #5 SALES QUESTIONNAIRES COMMERCIAL & RESIDENTIAL**



# Bill Furst

## SARASOTA COUNTY PROPERTY APPRAISER

2001 Adams Lane, Sarasota, FL, 34237 | Ph: 941.861.8200 | F: 941.861.8260 | www.sc-pa.com

2/9/2024

Zone: «zone»

Dear Property Owner,

This letter is a request for additional information about a recent real estate transfer:

Account Number: «Strap»  
Date of Sale: «SaleDate»  
Indicated Selling Price: «SalePrice»  
Property Address: «situs»

The Sarasota County Property Appraiser’s office is responsible for evaluating each transfer and reporting all recorded sales to the Florida Department of Revenue. To accomplish this, we need to understand whether transfers are sales between unrelated parties, if any unusual conditions affected the selling price, or if any other terms may have affected the price paid.

The documents recorded through the Clerk of the Court do not always provide sufficient information about each transfer. Please complete our questionnaire online or on the reverse of this letter to provide us with the additional information we require. A copy of the settlement from the closing agent is of significant benefit to our appraisal department. The closing statement can be provided in addition to the questionnaire.

To complete the questionnaire online please go to [www.sc-pa.com/salesqcomm](http://www.sc-pa.com/salesqcomm) and enter the following:

**code:** «InstrumentNumber» and **pin:** «zone»

Providing this information ensures that we can more reliably estimate the just value of similar property in the county. Maintaining fairness and equity in the property tax base better serves you and all taxpayers in Sarasota County.

If we may be of assistance, please contact us through our website at [www.SC-PA.com](http://www.SC-PA.com) or by calling 941.861.8200.

Thank you for your consideration and assistance to the property appraiser in fulfilling his duties.

Respectfully,

Wynta Loughrey  
Commercial Valuation Manager

«Own1\_name»  
«Own2\_name»  
«mail\_addr\_1»  
«mail\_addr\_2»  
«mail\_city\_state\_zip»  
«country»

**Account Number** «Strap»    **Situs Address** «situs»    **Date of Sale:**

Yes   No

- a)   Did the sale involve a real estate broker? If yes, please provide the name, company and telephone number, if available. \_\_\_\_\_
- b)   Did the seller receive all cash in exchange for the property. \_\_\_\_\_
- c) If the answer to the previous question is "no", did the seller provide financing? Please state how much of the purchase price was seller-financed, and the terms and conditions. \_\_\_\_\_  
\_\_\_\_\_
- d) What were the closing costs paid by the seller? \$ \_\_\_\_\_ >(or include a copy of the closing statement and/or sales contract)
- e) What were the closing costs paid by the buyer? \$ \_\_\_\_\_
- f)   Were any personal property items or other assets included in the sale price? If yes, what were they and how much was paid for them?  
\_\_\_\_\_  
\_\_\_\_\_
- g) How long was the property listed for sale on the market? \_\_\_\_\_ (in days or months).
- h)   Were there any special restrictions on the property that influenced the price paid, such as easements, liens or encumbrances? If yes, please explain. \_\_\_\_\_  
\_\_\_\_\_
- i)   Were there any conditions which influenced the price because either the buyer or seller were less than willing participants, such as: pending foreclosure, court ordered sale, distress sale, title defects, partial interest to a third party? If yes, please explain. \_\_\_\_\_  
\_\_\_\_\_
- j)   Do you plan to occupy this property? If yes, what type of business will you operate? \_\_\_\_\_
- k)   Do you plan to rent any portion of this property? (Please circle your responses, as appropriate, provide typical rents, if applicable). If yes, how much space will be rented, and at what rental rate? \$ \_\_\_\_\_ per month / year for \_\_\_\_\_ / sq. ft. / apartment / other \_\_\_\_\_  
\_\_\_\_\_
- l)   Was the property purchased primarily for land value? If yes, please explain your investment plans and estimated time frame for development: \_\_\_\_\_
- m)   Since the purchase, have there been any changes made to the property, such as rebuilding, remodeling or repairs? If yes, please describe what was done and how much additional investment has been made. \_\_\_\_\_  
\_\_\_\_\_
- n)   Was the property purchased for investment (income-producing) purposes? If so, please provide the following information, if applicable to your evaluation:

		Historical			Projected
o1	Potential gross income	\$ _____		o4	\$ _____
o2	Vacancy/collection Loss	\$ _____		o5	\$ _____
o3	Net operating income	\$ _____		o6	\$ _____

- o) Please identify which of the following expenses are paid by the landlord and which by the tenant?

<u>Landlord</u>	<u>Tenant</u>	<u>Landlord</u>	<u>Tenant</u>	<u>Landlord</u>	<u>Tenant</u>		
<input type="checkbox"/>	<input type="checkbox"/>	R. E. Taxes	<input type="checkbox"/>	<input type="checkbox"/>	Maintenance	<input type="checkbox"/>	Management Fee
<input type="checkbox"/>	<input type="checkbox"/>	Insurance	<input type="checkbox"/>	<input type="checkbox"/>	Utilities	<input type="checkbox"/>	Administrative Costs
<input type="checkbox"/>	<input type="checkbox"/>	Marketing	<input type="checkbox"/>	<input type="checkbox"/>	CAM (Common area)	<input type="checkbox"/>	Other _____
- p) **Please include a copy of the settlement statement from the closing agent. It will aid this office in considering the costs of purchase and expenses of sale as outlined in Florida Law.**
- q) **Please attach your comments or provide any additional information that you believe is important.**

\_\_\_\_\_  
Signature  
(Please circle one) Buyer, Representative, Attorney, Accountant

\_\_\_\_\_  
Daytime Telephone Number

Information provided is CONFIDENTIAL, in accordance with Florida Law.



# Bill Furst

## SARASOTA COUNTY PROPERTY APPRAISER

2001 Adams Lane, Sarasota, FL, 34237 | Ph: 941.861.8200 | F: 941.861.8260 | www.sc-pa.com

2/9/2024 Zone: «zone»

«Own1\_name»  
«Own2\_name»  
«mail\_addr\_1»  
«mail\_addr\_2»  
«mail\_city\_state\_zip»  
«country»

Dear Property Owner,

This letter is a request for additional information about a recent real estate transfer:

Account Number: «Strap» Date of Sale: «SaleDate»  
Property Address: «Situs» Indicated Selling Price: «SalePrice»

The Sarasota County Property Appraiser’s office is responsible for evaluating each transfer and reporting all recorded sales to the Florida Department of Revenue. To accomplish this, we need to understand whether transfers are sales between unrelated parties, if any unusual conditions affected the selling price, or if any other terms may have affected the price paid.

Unfortunately, the documents recorded through the Clerk of the Court provide a minimum amount of information about each transfer. Please complete our questionnaire online or on the reverse of this letter to provide us with the additional information we require. A copy of the settlement from the closing agent is of significant benefit to our appraisal department.

To complete the questionnaire online please go to [www.sc-pa.com/salesq](http://www.sc-pa.com/salesq) and enter the following:

**code:** «InstrumentNumber» and **pin:** «zone»

Providing this information ensures that we can more reliably estimate the just value of similar property in the county. Maintaining fairness and equity in the property tax base better serves you and all taxpayers in Sarasota County.

**For owner-occupied residential units, a reminder on Homestead Exemption:** You must make an application to be considered for exemptions at this property; exemptions and accumulated assessment caps do not transfer and they are not inherited from the previous owner. Your taxable value will reset to full market value on January 1 following the transfer.

If we may be of assistance, please contact us through our website at [www.SC-PA.com](http://www.SC-PA.com) or by calling 941.861.8200.

Thank you for your consideration and assistance to the property appraiser in fulfilling his duties.

Yours truly,

Tod Abrahamson  
Residential Valuation Manager

Account Number «Strap»

Situs Address «situs»

Instrument Number «InstrumentNumber» Instrument Type «InstrumentType» Sale Recording Date «RecordDate»

PLEASE ANSWER THE FOLLOWING QUESTIONS:

**1. Were there special factors affecting the sale?**

- Sale between immediate family members (SPECIFY THE RELATIONSHIP): \_\_\_\_\_
- Sale involved corporate affiliates belonging to the same parent company
- Sale of convenience (correct defects in title; create a joint or common tenancy, etc.)
- Auction sale
- Deed transfer in lieu of foreclosure or repossession
- Forced sale or sheriff's sale
- Sale by judicial order (guardian, executor, conservator)
- Sale involved a government agency or public utility
- Buyer (new owner) is a religious, charitable, or benevolent organization, school or educational association
- Land contract or contract for deed
- Sale of only a partial interest in the real estate
- Sale involved a trade or exchange of properties
- None of the above (specify) \_\_\_\_\_

**2. What was the use of property at the time of sale? (check one)**

- Single family residence  Agricultural land
- Farm/ranch with residence  Vacant lot
- Multi family residential # Units \_\_\_\_\_
- Condominium unit  Commercial/industrial
- Other (specify) \_\_\_\_\_

**3. Was there a change in use after the sale?**

- Yes  No If yes, please explain \_\_\_\_\_

**4. Was the property rented or leased at the time of sale?**

- Yes - Rent \$ \_\_\_\_\_ per mo.  No

**5. Do you plan to rent this Property?**

- Yes - Asking Rent \$ \_\_\_\_\_ per mo.  No

**6. Did the sale price include an existing business?**

- Yes  No

**7. Was any personal property (such as furniture, equipment, machinery, livestock, crops, business franchise or inventory, etc.) included in the sale price?**

- Yes  No

If yes, please describe \_\_\_\_\_

Estimated value of all personal property items included in the sale price \$ \_\_\_\_\_

**8. Any recent changes to the property?  Yes  No**

- New construction  Demolition
- Remodeling  Additions
- Was the work performed by a professional?
- Yes  No
- Describe the work or changes made: \_\_\_\_\_

**9. How was the property marketed? (check all that apply)**

- Listed with real estate agent
- Displayed a "For Sale" sign
- Advertised in the newspaper
- Offered by word of mouth
- Advertised on internet

**10. How long was the property on the market?**

Approximately \_\_\_\_\_ months

**11. What was the Sale Price \$ \_\_\_\_\_**

**12. When did this sale go under contract?**

Date \_\_\_\_\_

**13. What was the method of financing? (check all that apply)**

- New loan(s) from a financial institution
- Assumption of existing loan(s)
- Amount \$ \_\_\_\_\_
- Seller financing
- Amount \$ \_\_\_\_\_
- Interest rate \_\_\_\_\_ % Term \_\_\_\_\_
- Trade of property:
- estimated value \$ \_\_\_\_\_
- Describe traded property \_\_\_\_\_

- All cash

**14. Was there an appraisal made on the property?**

- Yes (Appraised Value \$ \_\_\_\_\_)  No

**15. Did Seller pay or credit any of Buyers expenses, such as loan fees or points, repair credits, etc?**

- Yes  No If yes, please explain \_\_\_\_\_

**16. In your opinion, is the total sale price a fair reflection of the market value for the real estate on the sale date?**

- Yes  No If no, please explain \_\_\_\_\_

Please Print Name \_\_\_\_\_  Buyer  Seller  Agent

**SIGNATURE** X \_\_\_\_\_

Daytime phone: (\_\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

# HOMESTEAD & EXEMPTIONS

## MEANS TAX SAVINGS FOR YOU

- **Homestead**
- **Widowed** (Unremarried)
- **Senior** Limited Income Age 65+
- **Disabled** (Non-Service Connected)
- **Veterans** Disability, or Surviving Spouse
- **65+ Combat Disabled Veteran**, or Surviving Spousal Discounts
- Overseas **Deployed Military** Discounts
- Disabled Line of Duty **Florida First Responder**, or Surviving Spouse
- **Surviving Spouse -Line of Duty** of a **US Servicemember**, or a **Florida First Responder**

If you own and occupy your Sarasota County property and it is your primary residence, you may be eligible for tax savings by filing an application.

**E-File an application at [www.SC-PA.com/applyonline](http://www.SC-PA.com/applyonline)**

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**Bill Furst**  
**SARASOTA COUNTY**  
**PROPERTY APPRAISER**

**Connect with Us**

-  [www.sc-pa.com](http://www.sc-pa.com)
-  941.861.8200
-  PA@sc-pa.com

**Full-Time Locations to Serve You**

**Downtown Sarasota**  
 Terrace Building  
**2001 Adams Lane**

**Venice**  
 R. L. Anderson Administration Building  
**4000 S. Tamiami Trl.**

**North Port**  
 North Port City Hall  
**4970 City Hall Blvd.**




**HOURS**  
**Mon-Fri**  
**8:30-5:00**  
**All Locations!**

Mailing Address: **Sarasota County Property Appraiser, 2001 Adams Lane, Sarasota FL 34237**



**Bill Furst**  
**SARASOTA COUNTY**  
**PROPERTY APPRAISER**

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**HOURS**  
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**All Locations!**

Mailing Address: **Sarasota County Property Appraiser, 2001 Adams Lane, Sarasota FL 34237**

# **JOB #6 TPP TANGIBLE TAX RETURN LETTER**





# Bill Furst

## SARASOTA COUNTY PROPERTY APPRAISER

2001 Adams Lane, Sarasota, FL, 34237 | Ph: 941.861.8200 | F: 941.861.8260 | www.sc-pa.com

December 30, 2023

ownername1  
mailaddress1  
mailaddress2  
city state zip  
country-*International Use Only*

Account #: id Location: situs

Re: 2024 Tangible Personal Property Tax Return

Dear Taxpayer:

The Sarasota County Property Appraiser's Office offers three convenient ways to file your Tangible Personal Property tax return: online, by mail, or in person. To be considered timely, the return must be filed by **April 1, 2024**.

1. FILE ONLINE: Visit our website at [www.SC-PA.com](http://www.SC-PA.com) and click on the TPP online filing link. You will be required to use the following username and password to log in to your account.

Username: **username**

Password: **password**

Once you submit the online return, an email will be generated confirming receipt of the Tangible Personal Property Return. If an agent files the tax return on your behalf, their access to your username and password serves as their Letter of Authorization.

2. BY MAIL: Complete a DR-405 which can be found on our website at [www.SC-PA.com](http://www.SC-PA.com) under our Download Forms page. Click on the Tangible Personal Property Tax Return (DR-405) link for a blank form. Download and complete the form and mail it with supporting documents to:

Sarasota County Property Appraiser  
Attn: TPP Department  
2001 Adams Lane  
Sarasota, FL 34237-7005

3. IN PERSON: You may also hand deliver your return to either our Sarasota or Venice offices.

If an agent files the tax return on your behalf by mail or in person, you must send us a signed Letter of Authorization by April 1, 2024, before we can accept the return. Failure to timely file a return is subject to penalties under Section 193.052, Florida Statutes.

Sincerely,

Bill Furst, CFA

Sarasota County Property Appraiser

Sarasota County Property Appraiser RFQ 2024-01

# **JOB #7 HOMESTEAD EXEMPTION RENEWAL RECEIPT**



Parcel ID/ Account # XXXXXXXXXX	Homestead <input type="checkbox"/>	Widow/Widower <input type="checkbox"/>	Disability <input type="checkbox"/>	Senior Limited Income <input type="checkbox"/>
Situs Address : ADDRESS DATA				

**IMPORTANT EXEMPTION INFORMATION-** This is an automatic renewal receipt for property tax exemption/s for the property listed above. **Review and consider ineligibility standards on the reverse side.** If you are no longer eligible detach and mail the removal request to the Sarasota County Property Appraiser's office.

January 1, 2025 Exemptee/s:

NAME1

NAME2

NAME3

NAME4

NAME5

NAME6

Life changing events such as marriage, divorce, or death will impact your exemption status and require written notification to the property appraiser including a DR-501 change application, even if you still own the property.

**Exemptions are not transferable or inheritable.** If your name is not listed on this renewal receipt, it is your responsibility to file a DR-501 application by March 1, **2025**. If there is a transfer of title on this property the previous owner's exemption will terminate. Visit our website at [www.SC-PA.com](http://www.SC-PA.com) or call us at (941) 861-8200 for more information.

**WARNING: THERE ARE SEVERE PENALTIES FOR FALSELY CLAIMING EXEMPTIONS** Florida law prescribes that it is the owner's responsibility to inform the Property Appraiser of any changes in ownership status or use of the property. Such changes may affect the exemption. Reference Sections 196.131 and 196.161, Florida Statutes

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---

PLACE  
STAMP  
HERE

---

BILL FURST  
 SARASOTA COUNTY PROPERTY APPRAISER  
 2001 ADAMS LN  
 SARASOTA FL 34237-7005

Intelligent Mail Barcode here

Bill Furst  
Sarasota County Property Appraiser  
2001 Adams Lane  
Sarasota, FL 34237-7005

RETURN SERVICE REQUESTED

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
PAID  
MELBOURNE, FL  
PERMIT #724

## RECEIPT FOR 2024 PROPERTY TAX EXEMPTION RENEWAL

||||| (IMB code)

NAME 1  
NAME 2  
NAME 3  
ADDRESS 1  
ADDRESS 2  
ADDRESS 3  
CITY STATE ZIP



2024

SCPA-500AR  
R. 10/22

Account #	XXXXXXXXXX	Property Address:	ADDRESS DATA
-----------	------------	-------------------	--------------

### EXEMPTION INELIGIBILITY CONSIDERATIONS—CHECK ALL THAT APPLY

- I no longer occupy this property as my primary residence, Date moved \_\_\_\_\_
- I am no longer a permanent resident of Florida.
- My NEW mailing address is: \_\_\_\_\_
- This property was  Entirely  Partially rented from (dates) \_\_\_\_\_ to \_\_\_\_\_
- My Marital Status has changed.  Married  Divorced Date \_\_\_\_\_
- Owner is deceased. Name \_\_\_\_\_ Date of Death \_\_\_\_\_
- My household income exceeds the annual limitation **\$XX,XXX** (*ONLY for the age 65 or older senior exemption*)
- I am **NOT** eligible to receive Homestead or other exemptions on this property because I or my spouse are claiming the benefit of a permanent residency-based tax exemptions or tax credits on another property elsewhere in the **U.S. or in Florida** (Examples: Homeowner and Homestead Exemptions, Star, Veteran, Senior, Disability, Lottery Credit, Residency Credit, Owner-Occupancy, PRE, Co-Op Reductions, etc. )
- Other explain: \_\_\_\_\_

### IF YOU CHECKED ANY OF THE ABOVE—SIGN AND RETURN BY US MAIL

Signature: \_\_\_\_\_ Phone: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_  
Sarasota County Property Appraiser RFQ 2024-01 Page 68

Parcel ID/ Account # XXXXXXXXXX	Homestead <input type="checkbox"/>	Widow/Widower <input type="checkbox"/>	Disability <input type="checkbox"/>	Senior Limited Income <input type="checkbox"/>
Situs Address : ADDRESS DATA				

**IMPORTANT EXEMPTION INFORMATION-** This is an automatic renewal receipt for property tax exemption/s for the property listed above. **Review and consider ineligibility standards on the reverse side.** If you are no longer eligible detach and mail the removal request to the Sarasota County Property Appraiser's office.


January 1, 2024 Exemptee/s:

NAME1	NAME2
NAME3	NAME4
NAME5	NAME6

Life changing events such as marriage, divorce, or death will impact your exemption status and require written notification to the property appraiser including a DR-501 change application, even if you still own the property.

**Exemptions are not transferable or inheritable.** If your name is not listed on this renewal receipt, it is your responsibility to file a DR-501 application by March 1, **2024**. If there is a transfer of title on this property the previous owner's exemption will terminate. Visit our website at [www.SC-PA.com](http://www.SC-PA.com) or call us at (941) 861-8200 for more information.

**WARNING: THERE ARE SEVERE PENALTIES FOR FALSELY CLAIMING EXEMPTIONS** Florida law prescribes that it is the owner's responsibility to inform the Property Appraiser of any changes in ownership status or use of the property. Such changes may affect the exemption. Reference Sections 196.131 and 196.161, Florida Statutes

_____		_____
_____		PLACE STAMP HERE
_____		_____

BILL FURST  
 SARASOTA COUNTY PROPERTY APPRAISER  
 2001 ADAMS LN  
 SARASOTA FL 34237-7005

Intelligent Mail Barcode here

**JOB #8 ORGANIZATIONAL EXEMPTION RENEWAL  
RECEIPT**

Bill Furst  
Sarasota County Property Appraiser  
2001 Adams Lane  
Sarasota, FL 34237-7090

RETURN SERVICE REQUESTED

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
**PAID**  
MELBOURNE, FL  
PERMIT #724

RECEIPT FOR **2020** TOTAL OR PARTIAL EXEMPTION RENEWAL  
(YEAR)

Legal Description	Account #
LOT 10 LAKESIDE MARKETPLACE	1115-02-0100
	Pink = Variable Data to be lasered.

\*\*\*\*\*AUTO\*\*3-DIGIT 342  
WOODOFF LLC  
WILL-RIDGE ASSOCIATES LLC  
8210 LAKEWOOD RANCH BLVD  
LAKEWOOD RANCH, FL 34202-5157

000001  
420###



Account #
1115-02-0100

DR-498AR  
R. 12/13

Tax Year 2020

**REMOVAL OF TOTAL OR PARTIAL EXEMPTION**

This property no longer qualifies for a total or partial exemption. As of January 1 of this year, the property was not being used for tax exempt purposes.

**WARNING**

Florida Law prescribes that it is the duty of the owner of any property to notify the property appraiser promptly whenever the use of the property or the status or condition of the owner changes so as to change the exempt status of the property. If any property owner fails to so notify the property appraiser and the property appraiser determines that for any year within the prior 10 years the owner was not entitled to receive such exemption, the property shall be subject to the taxes exempted as a result of such failure, plus 15 percent interest per annum and a penalty of 50 percent of the taxes exempted. Reference Sec. 196.011 (9)(a)F.S.

Please remove the above exemption from my property for the current year.

Signature

Date

Phone #

Sarasota County Property Appraiser RFQ 2024-01

Page 71



If no longer qualified for the exemption, sign on the reverse, detach above card, affix postage and mail before March 1.

**TOTAL OR PARTIAL EXEMPTION RECEIPT**

Your total or partial exemption application for this tax year is being automatically renewed. This is your receipt.

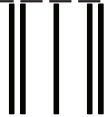
If you are no longer entitled to a total or partial exemption, you must sign the exemption removal request on the reverse side of this document and return it to the Property Appraiser.

There are severe penalties for falsely claiming a total or partial exemption. You are no longer eligible for a total or partial exemption if the property is **not** being used primarily for a bona fide exempt purpose.

If you are applying for a total or partial exemption on new property for the first time, you must apply at the Sarasota County Property Appraiser's Office on or before March 1st of this year.

If you have any questions concerning exemptions or this form, call our office at 941-861-8200.

-----

_____ _____ _____		_____ PLACE STAMP HERE _____
-------------------------	---	--

BILL FURST  
SARASOTA COUNTY PROPERTY APPRAISER  
2001 ADAMS LN  
SARASOTA FL 34237-7090

# **JOB #9 TRIM & TRIM SUPPLEMENT**

**SARASOTA COUNTY TAXING AUTHORITIES  
2023 NOTICE OF PROPOSED PROPERTY TAXES AND  
PROPOSED OR ADOPTED NON-AD VALOREM ASSESSMENTS**

**DO NOT PAY  
THIS IS NOT A BILL**

**ACCOUNT #: 0389030400**

SITE ADDRESS:  
VISTERA BLVD

**EVACUATION LEVEL: D**

LOCATION DESCRIPTION:  
TRACT 400, VISTERA PHASE 1, PB 56 PG 420-457



N

BORDER ROAD INVESTMENTS LLC  
5800 LAKEWOOD RANCH BLVD N  
LAKEWOOD RANCH FL 34240-8479



6 - 163

TAXING AUTHORITY TAX INFORMATION								
TAXING AUTHORITY	PRIOR YEAR TAXABLE VALUE	YOUR FINAL TAX RATE AND TAXES LAST YEAR		CURRENT YEAR TAXABLE VALUE	YOUR TAX RATE AND TAXES THIS YEAR IF NO BUDGET CHANGE IS MADE		YOUR TAX RATE AND TAXES THIS YEAR IF PROPOSED BUDGET CHANGE IS MADE	
	COLUMN 1	COLUMN 2 RATE	COLUMN 3 TAXES	COLUMN 4	COLUMN 5 RATE	COLUMN 6 TAXES	COLUMN 7 RATE	COLUMN 8 TAXES
Sarasota County	0	3.2497	0.00	4,300	2.0000	8.60	1.0000	4.30
County Debt	0	0.0915	0.00	4,300	2.0000	8.60	1.0000	4.30
Legacy Trail Debt	0	0.0551	0.00	4,300	2.0000	8.60	1.0000	4.30
County Mosquito	0	0.0500	0.00	4,300	2.0000	8.60	1.0000	4.30
County Hospital Bd	0	1.0420	0.00	4,300	2.0000	8.60	1.0000	4.30
SWFWMD	0	0.2260	0.00	4,300	2.0000	8.60	1.0000	4.30
WCIND	0	0.0394	0.00	4,300	2.0000	8.60	1.0000	4.30
Public Schools:								
SB State Law	0	3.0240	0.00	4,300	2.0000	8.60	1.0000	4.30
SB Local Board	0	3.2480	0.00	4,300	2.0000	8.60	1.0000	4.30
Venice	0	4.3600	0.00	4,300	2.0000	8.60	1.0000	4.30
Venice Debt	0	0.4694	0.00	4,300	2.0000	8.60	1.0000	4.30
<b>AD VALOREM TOTALS</b>		15.8551	0.00		22.0000	94.60	11.0000	47.30
<b>AD VALOREM AND NON-AD VALOREM TOTALS</b>			0.00			94.60		47.30

PROPERTY APPRAISER VALUE INFORMATION			
AGRICULTURAL	APPLIES TO	PRIOR VALUE	CURRENT VALUE
MARKET VALUE		0	6,647,600
ASSESSED VALUE	ALL TAXES	0	4,300
ASSESSED VALUE	NON-SCHOOL TAXES	0	4,300
APPLIED ASSESSMENT REDUCTION	APPLIES TO	PRIOR VALUE	CURRENT VALUE
SAVE OUR HOMES BENEFIT	ALL TAXES	0	0
NON-HOMESTEAD 10% CAP BENEFIT	NON-SCHOOL TAXES	0	0
AGRICULTURAL CLASSIFICATION	ALL TAXES	0	6,643,300
OTHER	ALL TAXES	0	0
EXEMPTIONS	APPLIES TO	PRIOR VALUE	CURRENT VALUE
FIRST HOMESTEAD	ALL TAXES	0	0
ADDITIONAL HOMESTEAD	NON-SCHOOL TAXES	0	0
LIMITED INCOME SENIOR	ALL COUNTY TAXES	0	0
LIMITED INCOME SENIOR	ALL CITY TAXES	0	0
HISTORIC	COUNTY OPERATING	0	0
OTHER	ALL TAXES	0	0

If you feel the market value of the property is inaccurate or does not reflect fair market value as of January 1, or if you are entitled to an exemption or classification that is not reflected, contact one of the Sarasota County Property Appraiser offices below:

**2001 Adams Lane • Sarasota, FL • 34237  
4000 S. Tamiami Trail • Venice, FL • 34293  
Customer Service (941) 861-8200**

If the Property Appraiser's Office is unable to resolve the matter as to the market value, classification, or an exemption, you may file a petition for adjustment with the Value Adjustment Board. Petition forms are available online at [www.SC-PA.com](http://www.SC-PA.com). Petitions must be filed with the Clerk to the Value Adjustment Board or at [www.SarasotaClerk.com](http://www.SarasotaClerk.com).

**Petitions must be filed on or before  
September 9, 2023**

**See reverse side for Non-Ad Valorem Assessments scheduled to appear on your final tax bill.**

**EXPLANATION OF "TAXING AUTHORITY TAX INFORMATION" SECTION**

**COLUMN 1 - "PRIOR TAXABLE VALUE"**

This column shows the prior assessed value less all applicable exemptions used in the calculation of taxes for that specific taxing authority.

**COLUMNS 2 & 3 - "YOUR FINAL TAX RATE AND TAXES LAST YEAR"**

These columns show the tax rate and taxes that applied last year to your property. These amounts were based on budgets adopted last year and your property's previous taxable value.

**COLUMN 4 - "CURRENT TAXABLE VALUE"**

This column shows the current assessed value less all applicable exemptions used in the calculation of taxes for that specific taxing authority. Various taxable values in this column may indicate the impact of Limited Income Senior or the Additional Homestead exemption. Current year taxable values are as of January 1.

**COLUMNS 5 & 6 - "YOUR TAX RATE AND TAXES THIS YEAR IF NO BUDGET CHANGE IS MADE"**

These columns show what your tax rate and taxes will be IF EACH TAXING AUTHORITY DOES NOT CHANGE ITS PROPERTY TAX LEVY. These amounts are based on last year's budgets and your current assessments.

**COLUMNS 7 & 8 - "YOUR TAX RATE AND TAXES THIS YEAR IF PROPOSED BUDGET CHANGE IS MADE"**

These columns show what your tax rate and taxes will be this year under the BUDGET ACTUALLY PROPOSED by each taxing authority. The proposal is NOT final and may be amended at the public hearings shown below. The difference between columns 6 and 8 is the tax change proposed by each local taxing authority and is NOT the result of higher assessments.

**EXPLANATION OF "PROPERTY APPRAISER VALUE INFORMATION" SECTION**

**MARKET (JUST) VALUE** - The most probable sale price for a property in a competitive, open market involving a willing buyer and a willing seller, per Section 193.011, F.S.

**ASSESSED VALUE** - The value of your property after any "assessment reductions" have been applied. This value may also reflect an agricultural classification. If "assessment reductions" are applied or an agricultural classification is granted, the assessed value may be different for School versus Non-School taxing authorities and for the purpose of calculating tax levies.

**APPLIED ASSESSMENT REDUCTION** - Properties can receive an assessment reduction for a number of reasons including the Save Our Homes Benefit and the 10% non-homestead property assessment limitation. Agricultural Classification is not an assessment reduction, it is an assessment determined per Section 193.461, F.S.

**EXEMPTIONS** - Any exemption that impacts your property is listed in this section along with its corresponding exemption value. Specific dollar or percentage reductions in assessed value may be applicable to a property based upon certain qualifications of the property or property owner. In some cases, an exemption's value may vary depending on the taxing authority. The tax impact of an exemption value may also vary for the same taxing authority, depending on the levy. (i.e., operating millage vs. debt service millage)

**TAXABLE VALUE** - The value used to calculate the tax due on your property. Taxable value is the assessed value minus the value of your exemptions and discounts.

**TAXING AUTHORITY HEARING INFORMATION**

The Taxing Authorities which levy property taxes against your property will soon hold **PUBLIC HEARINGS** to adopt budgets and tax rates for the next year. The purpose of these **PUBLIC HEARINGS** is to receive opinions from the general public and to answer questions on the proposed tax change and budget **PRIOR TO TAKING FINAL ACTION**. Each Taxing Authority may **AMEND OR ALTER** its proposals at the hearing.

TAXING AUTHORITY	PUBLIC HEARING LOCATION	DATE	TIME	PHONE #
Sarasota County	1660 Ringling Blvd., Sarasota, Florida 34236	01/01/2023	12:00 AM	(941)861-5000
County Debt	1660 Ringling Blvd., Sarasota, Florida 34236	01/01/2023	12:00 AM	(941)861-5000
Legacy Trail Debt	1660 Ringling Blvd., Sarasota, Florida 34236	01/01/2023	12:00 AM	(941)861-5000
County Mosquito	1660 Ringling Blvd., Sarasota, Florida 34236	01/01/2023	12:00 AM	(941)861-5000
County Hospital Bd	1921 Waldemere Street, Sarasota, FL 34239	01/01/2023	12:00 AM	(941)917-7164
SWFWMD	7601 US Hwy 301, Tampa, 33637	01/01/2023	12:00 AM	(800)423-1476
WCIND	401 West Venice Avenue, Venice, FL 34285	01/01/2023	12:00 AM	(941)485-9402
Public Schools:				
SB State Law	1960 Landings Blvd., Sarasota, Florida 34231	01/01/2023	12:00 AM	(941)927-9000
SB Local Board	1960 Landings Blvd., Sarasota, Florida 34231	01/01/2023	12:00 AM	(941)927-9000
Venice	401 W. Venice Avenue, Venice, FL 34285	01/01/2023	12:00 AM	(941)486-2626
Venice Debt	401 W. Venice Avenue, Venice, FL 34285	01/01/2023	12:00 AM	(941)486-2626

**YOUR FINAL TAX BILL MAY CONTAIN NON-AD VALOREM ASSESSMENTS WHICH MAY NOT BE REFLECTED ON THIS NOTICE SUCH AS ASSESSMENTS FOR ROADS, FIRE, GARBAGE, LIGHTING, DRAINAGE, WATER, SEWAGE, OR OTHER GOVERNMENTAL SERVICES AND FACILITIES WHICH MAY BE LEVIED BY YOUR COUNTY, CITY, SPECIAL DISTRICTS OR OTHER TAXING AUTHORITY.** NOTE: Non-ad valorem assessments are placed on this notice at the request of the respective local governing boards. Your tax collector will be including them on the November tax notice. For details on particular non-ad valorem assessments, contact the levying local governing board. NOTE: Amounts shown on this form do **NOT** reflect early payment discounts you may have received or may be eligible to receive. (Discounts are a maximum of 4 percent of the amounts shown on this form.)

**NON-AD VALOREM ASSESSMENTS**

LEVYING AUTHORITY	PHONE #	PURPOSE OF ASSESSMENT/TOTAL REVENUE TO BE COLLECTED BY THIS DISTRICT	RATE	UNITS	ASSESSMENT
					<b>NON-AD VALOREM TOTALS</b>

**NOTICE: YOUR ACCOUNT HAS BEEN FLAGGED DUE TO A CHANGE OF MAILING ADDRESS.** The mailing address to which you received this notice is not the address the Sarasota County Property Appraiser has on record for you and your **tax bill may not be deliverable.**

**ACTION REQUIRED BY SEPTEMBER 20, 2023**

- 1) Go to [www.sc-pa.com/propertysearch](http://www.sc-pa.com/propertysearch) and search to view your property information.
- 2) Verify your mailing address. If it is not correct, click the "Change mailing address" link.
- 3) Complete the online form and submit your change of address.



**SCAN ME**

**HOMESTEAD EXEMPTION:** If your property receives a homestead exemption, **your exemption may be denied** due to a USPS change of address. Contact our Public Service & Exemptions department no later than September 20, 2023 regarding the status of your exemption. Phone: (941) 861-8200 Email: [CustomerService@sc-pa.com](mailto:CustomerService@sc-pa.com)

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## 2023 Ad Valorem Assessment Limitations

The statutory assessment limitation for this year is **3% for homesteaded property** and **10% for non-homesteaded property**. This applies to property owned before January 1, 2022 and does not include changes, additions, or improvements made during 2022. For non-homesteaded property, the school board levy is always taxed at full market value.

## Frequently Asked Questions

**What happened to the save our homes cap on my property? I purchased my home in 2022 and my values have changed.** A transfer of ownership or control of real property, with few exceptions, resets the assessed and taxable value to market value for the following year. Assessment limitations and exempt status are NOT inheritable, transferable, or continued. The Save Our Homes assessment limitation, unless ported from a previous Florida homestead with a new homestead application, does not apply in the first year of a new homestead.

**What is a Homestead Exemption?** It is an ad valorem tax benefit that a Florida resident, owning and permanently residing on real property on January 1, may be eligible to receive. The taxpayer must apply to receive this benefit. Homestead exemptions are not prorated based on a purchase date. Information about requirements and the application process is available on our website at [www.sc-pa.com](http://www.sc-pa.com), as well as a listing of other available exemptions.

**How does your office determine values?** Our office determines the value of your property based upon the real estate market as of January 1. We do not create value; buyers create value by their transactions in the marketplace. The appraiser's office has the legal responsibility to study those transactions and value property accordingly.

**Why did my value increase exceed the cap limit?** Did you make any changes, additions, or improvements in 2022? Once the applicable assessment limitation is applied (3% maximum assessed value increase for homestead, 10% for non-homestead), the value of any improvements are added at full market value. Some examples of improvements include: pool, patio, garage, new windows, new roof, renovations etc.

**How do I remove, change, or add a name from or to ownership of my property?** Property owners can remove, change, add names by recording the necessary document with the Sarasota Clerk of Circuit Court and County Comptroller. Property owners should consult with a professional such as an attorney or a title company to ensure that the recorded document accomplishes the intentions of the owner.

## Sarasota County Non-Ad Valorem Districts

**Non-ad valorem assessments are placed on the Notice of Proposed Taxes and Proposed or Adopted Non-Ad Valorem Assessments** (TRIM Notice) at the request of the respective local governing boards. Not all non-ad valorem levying authorities choose to participate in the TRIM Notice. Non-ad valorem assessments will appear on your property tax bill in November. Failure to pay the assessments will cause a tax certificate to be issued against the property which may result in a loss of title. All affected property owners have a right to appear at the public hearings and to file written objections with the local governing board within 20 days of the publication of the notice. For questions and information on non-ad valorem assessments, please contact the individual levying authorities listed on the back of your TRIM Notice. Additional contact information can also be found on our website at [www.sc-pa.com](http://www.sc-pa.com).

### SARASOTA COUNTY PUBLIC HEARING:

**5:30 PM on September 11, 2023 at 1660 Ringling Blvd, Sarasota, FL 34236**

**Districts (see page 2 of TRIM notice for applicable districts):** Fire District, Beach Restoration, Lighting /Public Improvement, Solid Waste Service, Stormwater Environmental Utility, Navigable Waterways, Water/Sewer

**What is the non-ad valorem County fire protection fee based on?** The County fire protection assessment is based on an equivalent billing unit (EBU) that is equal to 100 square feet of building improved space. The total square footage of all buildings within each property use category (single-family, multi-family and non-residential) was divided by 100 to determine the total number of EBUs for each property use category. More information is available at [www.scgov.net/firefee](http://www.scgov.net/firefee)

## Millage Rate or Non-Ad Valorem Fee Related Questions?

Refer to the back of the TRIM notice for telephone numbers and public hearing dates.



## Bill Furst SARASOTA COUNTY PROPERTY APPRAISER

2001 Adams Lane, Sarasota, FL, 34237 | Ph: 941.861.8200 | F: 941.861.8260 | [www.sc-pa.com](http://www.sc-pa.com)

Dear Sarasota County Property Owner:

This informational supplement is provided by the Sarasota County Property Appraiser's Office to assist you in understanding the enclosed **2023 Notice of Proposed Property Taxes and Proposed or Adopted Non-Ad Valorem Assessments** (TRIM Notice).

Florida law requires the property appraiser to prepare and mail the TRIM Notices to all property owners in the county on behalf of the taxing authorities in this jurisdiction. While property value is a component of the tax amount due, the property appraiser has no role in establishing millage rates or non-ad valorem assessment amounts.

The taxing authorities (i.e., county government, municipal government, school districts, water districts, and other taxing districts) are each responsible for establishing budgets and setting their millage (tax) rates. These rates are calculated by the various taxing authorities using this formula:

$$\text{Total Budgetary Need} / \text{Total taxable value} = \text{Millage Rate}$$

Questions regarding tax rates or budgets should be directed to the taxing authority contact listed on the back of your TRIM Notice. Remember, the TRIM Notice is not a bill, the Tax Collector will mail the tax bill in November after the taxing authority's budgets and millage rates are finalized.

The property appraiser is responsible for determining and reporting property values and administering property tax exemptions. My staff is ready to assist should you have questions about an exemption or property value.

Sincerely,

Bill Furst, CFA

## PROPERTY VALUE, ASSESSMENT, CLASSIFICATION OR EXEMPTIONS QUESTIONS?



**CALL US**  
(941) 861-8200



**EMAIL US**  
PA@sc-pa.com



**VISIT US ONLINE**  
[www.sc-pa.com](http://www.sc-pa.com)

## TAX BILL & PAYMENT QUESTIONS?

Contact the Tax Collector: [Info@SarasotaTaxCollector.com](mailto:Info@SarasotaTaxCollector.com) (941) 861-8300 [www.SarasotaTaxCollector.com](http://www.SarasotaTaxCollector.com)

## ADDITIONAL HOMESTEAD FOR SENIORS WITH LIMITED INCOME

**SENIOR LIMITED INCOME EXEMPTION** Sarasota County senior residents can apply for up to \$5,000 for the additionally approved exemption. And, depending upon where the eligible seniors reside, the local option ordinances offer up to \$50,000 in additional benefits. *§196.075, Florida Statutes*

**REQUIREMENTS FOR SENIOR 2023 EXEMPTIONS:** Primary homestead residence of at least one person aged 65 or more, and the combined household income cannot exceed **\$35,167**—the adjusted gross income limitation for the 2022 federal income tax year.

**ALREADY HAVE HOMESTEAD AND TURNING 65?** Call us at (941) 861-8200 to get on our senior mailing list for February 2024.

## QUESTIONS OR CONCERNS RELATING TO THE VALUE OF YOUR PROPERTY?

**INFORMAL CONFERENCE** We encourage you to speak with our staff to discuss questions regarding your property value, assessment, exemption or classification. Be prepared to present facts and provide supporting documentation. An informal conference is highly recommended, but not required. Call (941) 861-8200 to set up an appointment. *§194.011(2), Florida Statutes*

**VAB PETITION FILING** You may file a petition with the Value Adjustment Board (VAB) within 25 days after the mailing of the Notice of Proposed Property Taxes and Proposed or Adopted Non-Ad Valorem Assessments (TRIM Notice). All petitions must include the applicable filing fee. Find additional information regarding petitions at [www.SarasotaClerk.com](http://www.SarasotaClerk.com). *§194.011(3)(d), Florida Statutes*

**CIVIL ACTION IN COURT** You may contest a tax assessment or appeal a VAB decision in circuit court no later than 60 days after the tax roll is certified for the collection of taxes (this typically occurs during the first week of October). Or, if you filed a petition with the VAB and you do not agree with their decision, you may file a lawsuit in circuit court within 60 days after the VAB renders a decision on your case. Consultation with a legal professional is recommended. *§194.171(2), Florida Statutes*

## MOVED TO A NEW RESIDENCE?

**IS A HOMESTEAD APPLICATION NEEDED FOR MY NEW HOME? YES!** The Homestead Exemption and Save Our Homes benefit do not “follow” you to your new residence. Residents that have moved to a new homestead must file and apply for a homestead exemption and applicable portability (save our homes transfer of assessment difference).

**If you purchased property after January 1, 2023,** it may show assessment limitations and applicable exemptions from the previous owner. Per Florida Statute recapture rules, the property will reset to market value on January 1, 2024. If the property will be your primary Florida residence you must make an application by e-filing online on or before March 1.

## HAVE A NEW MAILING ADDRESS?

SCAN ME



**TO ENSURE TIMELY DELIVERY OF YOUR PROPERTY TAX BILL AND OTHER PROPERTY-RELATED NOTICES VERIFY OR SUBMIT A CHANGE OF ADDRESS:** Scan the code to launch our web page with a mobile device or visit us online at [www.sc-pa.com/propertysearch](http://www.sc-pa.com/propertysearch). Then search for your property and view your mailing information. Select the “Change mailing address” link just below the current mailing address to launch our web-based address change request. Enter your request and then press submit to notify us.

**OR SEND AN ADDRESS CHANGE WITH YOUR PROPERTY ACCOUNT NUMBER TO:**

**Sarasota County Property Appraiser**  
**2001 Adams Lane**  
**Sarasota, FL 34237**  
 or  
**PA@sc-pa.com**

# Notice of Proposed Property Taxes (TRIM Notice) Guide

**SARASOTA COUNTY TAXING AUTHORITIES**  
**2023 NOTICE OF PROPOSED PROPERTY TAXES AND**  
**PROPOSED OR ADOPTED NON-AD VALOREM ASSESSMENTS**

**DO NOT PAY**  
**THIS IS NOT A BILL**

ACCOUNT #: 0000000000

1  
2  
3  
4  
5  
6  
7  
8  
9  
0  
SAMPLE A. SAMPLE  
123 MAIN STREET  
ANY TOWN, FL 12345-6789

TAXING AUTHORITY TAX INFORMATION								
TAXING AUTHORITY	PRIOR YEAR TAXABLE VALUE	YOUR FINAL TAX RATE AND TAXES LAST YEAR		CURRENT YEAR TAXABLE VALUE	YOUR TAX RATE AND TAXES THIS YEAR IF NO BUDGET CHANGE IS MADE		YOUR TAX RATE AND TAXES THIS YEAR IF PROPOSED BUDGET CHANGE IS MADE	
		COLUMN 2 RATE	COLUMN 3 TAXES		COLUMN 4 RATE	COLUMN 5 RATE	COLUMN 6 TAXES	COLUMN 7 RATE
AD VALOREM TOTALS								
AD VALOREM AND NON-AD VALOREM TOTALS								

PROPERTY APPRAISER VALUE INFORMATION			
	APPLIES TO	PRIOR VALUE	CURRENT VALUE
MARKET VALUE			
ASSESSED VALUE	ALL TAXES		
ASSESSED VALUE	NON-SCHOOL TAXES		
APPLIED ASSESSMENT REDUCTION	APPLIES TO	PRIOR VALUE	CURRENT VALUE
SAVE OUR HOMES BENEFIT	ALL TAXES		
NON-HOMESTEAD 10% CAP BENEFIT	NON-SCHOOL TAXES		
AGRICULTURAL CLASSIFICATION	ALL TAXES		
OTHER	ALL TAXES		
EXEMPTIONS	APPLIES TO	PRIOR VALUE	CURRENT VALUE
FIRST HOMESTEAD	ALL TAXES		
ADDITIONAL HOMESTEAD	NON-SCHOOL TAXES		
LIMITED INCOME SENIOR	ALL COUNTY TAXES		
LIMITED INCOME SENIOR	ALL CITY TAXES		
HISTORIC	COUNTY OPERATING		
OTHER	ALL TAXES		

If you feel the market value of the property is inaccurate or does not reflect fair market value as of January 1, or if you are entitled to an exemption or classification that is not reflected, contact one of the Sarasota County Property Appraiser offices below:

**2001 Adams Lane • Sarasota, FL • 34237**  
**4000 S. Tamiami Trail • Venice, FL • 34293**  
**Customer Service (941) 861-8200**

If the Property Appraiser's Office is unable to resolve the matter as to the market value, classification, or an exemption, you may file a petition for adjustment with the Value Adjustment Board. Petition forms are available online at [www.SC-PA.com](http://www.SC-PA.com). Petitions must be filed with the Clerk to the Value Adjustment Board or at [www.SarasotaClerk.com](http://www.SarasotaClerk.com).

Petitions must be filed on or before

See reverse side for Non-Ad Valorem Assessments scheduled to appear on your final tax bill.

REV. 2020-06

**Account #** is a unique number identifying your property

**Taxing authorities** are the government bodies authorized to levy taxes on the property; includes county, school board, municipalities, etc.

**Market value** is the property appraiser's determination of value as of January 1. The following are considered: the selling price of comparable properties, income derived from the property, the replacement cost of improvements and other factors such as location and condition

**Assessment reductions** are benefits and use classifications which result in additional savings on your tax bill. The amount reflects the difference between market and assessed value

**Tax bills** are mailed in November by the Tax Collector's office

Know your **hurricane evacuation level**

**Taxable value** is assessed value minus your exemptions. The taxable value is multiplied by the tax rate set by each of the governing authorities to establish your ad valorem property tax bill

**Total ad valorem and non-ad valorem assessments** (see reverse side for non-ad valorem assessments scheduled to appear on your final tax bill)

**Exemptions** are shown for the current and prior tax years. If you are missing an exemption for which you applied, please contact our office immediately

If you have questions about the market value set by the property appraiser's office or feel you should have qualified for an exemption not shown, please contact our office for an informal review. The **deadline for filing** a petition appears on your notice

Refer to the back side of your TRIM Notice to view the following: 1) the public hearing information for ad valorem taxing authorities listed above, 2) your non-ad valorem assessments, and 3) additional explanation of the columns shown above.

**The sum of the ad valorem and non-ad valorem assessments provides an estimate of your total tax bill. Your final tax bill may contain non-ad valorem assessments from districts which have elected not to participate in this notice.**



## 2023 AD VALOREM ASSESSMENT LIMITATIONS

The statutory assessment limitation for this year is **3% for homesteaded property** and **10% for non-homesteaded property**. This applies to property owned before January 1, 2022 and does not include changes, additions, or improvements made during 2022. For non-homesteaded property, the school board levy is always taxed at full market value.

## FREQUENTLY ASKED QUESTIONS

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**What is a Homestead Exemption?** It is an ad valorem tax benefit that a Florida resident, owning and permanently residing on real property on January 1, may be eligible to receive. The taxpayer must apply to receive this benefit. Homestead exemptions are not prorated based on a purchase date. Information about requirements and the application process is available on our website at [www.sc-pa.com](http://www.sc-pa.com), as well as a listing of other available exemptions.

**How does your office determine values?** Our office determines the value of your property based upon the real estate market as of January 1. We do not create value; buyers create value by their transactions in the marketplace. The appraiser's office has the legal responsibility to study those transactions and value property accordingly.

**Why did my value increase exceed the cap limit?** Did you make any changes, additions, or improvements in 2022? Once the applicable assessment limitation is applied (3% maximum assessed value increase for homestead, 10% for non-homestead), the value of any improvements are added at full market value. Some examples of improvements include: pool, patio, garage, new windows, new roof, renovations etc.

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## SARASOTA COUNTY NON-AD VALOREM DISTRICTS

**Non-ad valorem assessments are placed on the Notice of Proposed Taxes and Proposed or Adopted Non-Ad Valorem Assessments** (TRIM Notice) at the request of the respective local governing boards. Not all non-ad valorem levying authorities choose to participate in the TRIM Notice. Non-ad valorem assessments will appear on your property tax bill in November. Failure to pay the assessments will cause a tax certificate to be issued against the property which may result in a loss of title. All affected property owners have a right to appear at the public hearings and to file written objections with the local governing board within 20 days of the publication of the notice. For questions and information on non-ad valorem assessments, please contact the individual levying authorities listed on the back of your TRIM Notice. Additional contact information can also be found on our website at [www.sc-pa.com](http://www.sc-pa.com).

### SARASOTA COUNTY PUBLIC HEARING:

**5:30 PM on September 11, 2023 at 1660 Ringling Blvd, Sarasota, FL 34236**

**Districts (see page 2 of TRIM notice for applicable districts):** Fire District, Beach Restoration, Lighting /Public Improvement, Solid Waste Service, Stormwater Environmental Utility, Navigable Waterways, Water/Sewer

**What is the non-ad valorem County fire protection fee based on?** The County fire protection assessment is based on an equivalent billing unit (EBU) that is equal to 100 square feet of building improved space. The total square footage of all buildings within each property use category (single-family, multi-family and non-residential) was divided by 100 to determine the total number of EBUs for each property use category. More information is available at [www.scgov.net/firefee](http://www.scgov.net/firefee)

## MILLAGE RATE OR NON-AD VALOREM FEE RELATED QUESTIONS?

Refer to the back of the TRIM notice for telephone numbers and public hearing dates.



## Bill Furst SARASOTA COUNTY PROPERTY APPRAISER

2001 Adams Lane, Sarasota, FL, 34237 | Ph: 941.861.8200 | F: 941.861.8260 | [www.sc-pa.com](http://www.sc-pa.com)

Dear Sarasota County Property Owner:

This informational supplement is provided by the Sarasota County Property Appraiser's Office to assist you in understanding the enclosed **2023 Notice of Proposed Property Taxes and Proposed or Adopted Non-Ad Valorem Assessments** (TRIM Notice).

Florida law requires the property appraiser to prepare and mail the TRIM Notices to all property owners in the county on behalf of the taxing authorities in this jurisdiction. While property value is a component of the tax amount due, the property appraiser has no role in establishing millage rates or non-ad valorem assessment amounts.

The taxing authorities (i.e., county government, municipal government, school districts, water districts, and other taxing districts) are each responsible for establishing budgets and setting their millage (tax) rates. These rates are calculated by the various taxing authorities using this formula:

$$\text{Total Budgetary Need} / \text{Total taxable value} = \text{Millage Rate}$$

Questions regarding tax rates or budgets should be directed to the taxing authority contact listed on the back of your TRIM Notice. Remember, the TRIM Notice is not a bill, the Tax Collector will mail the tax bill in November after the taxing authority's budgets and millage rates are finalized.

The property appraiser is responsible for determining and reporting property values and administering property tax exemptions. My staff is ready to assist should you have questions about an exemption or property value.

Sincerely,

Bill Furst, CFA

## PROPERTY VALUE, ASSESSMENT, CLASSIFICATION OR EXEMPTIONS QUESTIONS?



**CALL Us**  
(941) 861-8200



**EMAIL Us**  
PA@sc-pa.com



**VISIT Us ONLINE**  
[www.sc-pa.com](http://www.sc-pa.com)

## TAX BILL & PAYMENT QUESTIONS?

Contact the Tax Collector: [Info@SarasotaTaxCollector.com](mailto:Info@SarasotaTaxCollector.com) (941) 861-8300 [www.SarasotaTaxCollector.com](http://www.SarasotaTaxCollector.com)

## ADDITIONAL HOMESTEAD FOR SENIORS WITH LIMITED INCOME

**SENIOR LIMITED INCOME EXEMPTION** Sarasota County senior residents can apply for up to \$5,000 for the additionally approved exemption. And, depending upon where the eligible seniors reside, the local option ordinances offer up to \$50,000 in additional benefits. §196.075, Florida Statutes

**REQUIREMENTS FOR SENIOR 2023 EXEMPTIONS:** Primary homestead residence of at least one person aged 65 or more, and the combined household income cannot exceed **\$35,167**—the adjusted gross income limitation for the 2022 federal income tax year.

**ALREADY HAVE HOMESTEAD AND TURNING 65?** Call us at (941) 861-8200 to get on our senior mailing list for February 2024.

## QUESTIONS OR CONCERNS RELATING TO THE VALUE OF YOUR PROPERTY?

**INFORMAL CONFERENCE** We encourage you to speak with our staff to discuss questions regarding your property value, assessment, exemption or classification. Be prepared to present facts and provide supporting documentation. An informal conference is highly recommended, but not required. Call (941) 861-8200 to set up an appointment. §194.011(2), Florida Statutes

**VAB PETITION FILING** You may file a petition with the Value Adjustment Board (VAB) within 25 days after the mailing of the Notice of Proposed Property Taxes and Proposed or Adopted Non-Ad Valorem Assessments (TRIM Notice). All petitions must include the applicable filing fee. Find additional information regarding petitions at [www.SarasotaClerk.com](http://www.SarasotaClerk.com). §194.011(3)(d), Florida Statutes

**CIVIL ACTION IN COURT** You may contest a tax assessment or appeal a VAB decision in circuit court no later than 60 days after the tax roll is certified for the collection of taxes (this typically occurs during the first week of October). Or, if you filed a petition with the VAB and you do not agree with their decision, you may file a lawsuit in circuit court within 60 days after the VAB renders a decision on your case. Consultation with a legal professional is recommended. §194.171(2), Florida Statutes

## MOVED TO A NEW RESIDENCE?

**IS A HOMESTEAD APPLICATION NEEDED FOR MY NEW HOME?** YES! The Homestead Exemption and Save Our Homes benefit do not “follow” you to your new residence. Residents that have moved to a new homestead must file and apply for a homestead exemption and applicable portability (save our homes transfer of assessment difference).

**If you purchased property after January 1, 2023,** it may show assessment limitations and applicable exemptions from the previous owner. Per Florida Statute recapture rules, the property will reset to market value on January 1, 2024. If the property will be your primary Florida residence you must make an application by e-Filing online on or before March 1.

## HAVE A NEW MAILING ADDRESS?

SCAN ME



**TO ENSURE TIMELY DELIVERY OF YOUR PROPERTY TAX BILL AND OTHER PROPERTY-RELATED NOTICES VERIFY OR SUBMIT A CHANGE OF ADDRESS:** Scan the code to launch our web page with a mobile device or visit us online at [www.sc-pa.com/propertysearch](http://www.sc-pa.com/propertysearch). Then search for your property and view your mailing information. Select the “Change mailing address” link just below the current mailing address to launch our web-based address change request. Enter your request and then press submit to notify us.

**OR SEND AN ADDRESS CHANGE WITH YOUR PROPERTY ACCOUNT NUMBER TO:**

**Sarasota County Property Appraiser**

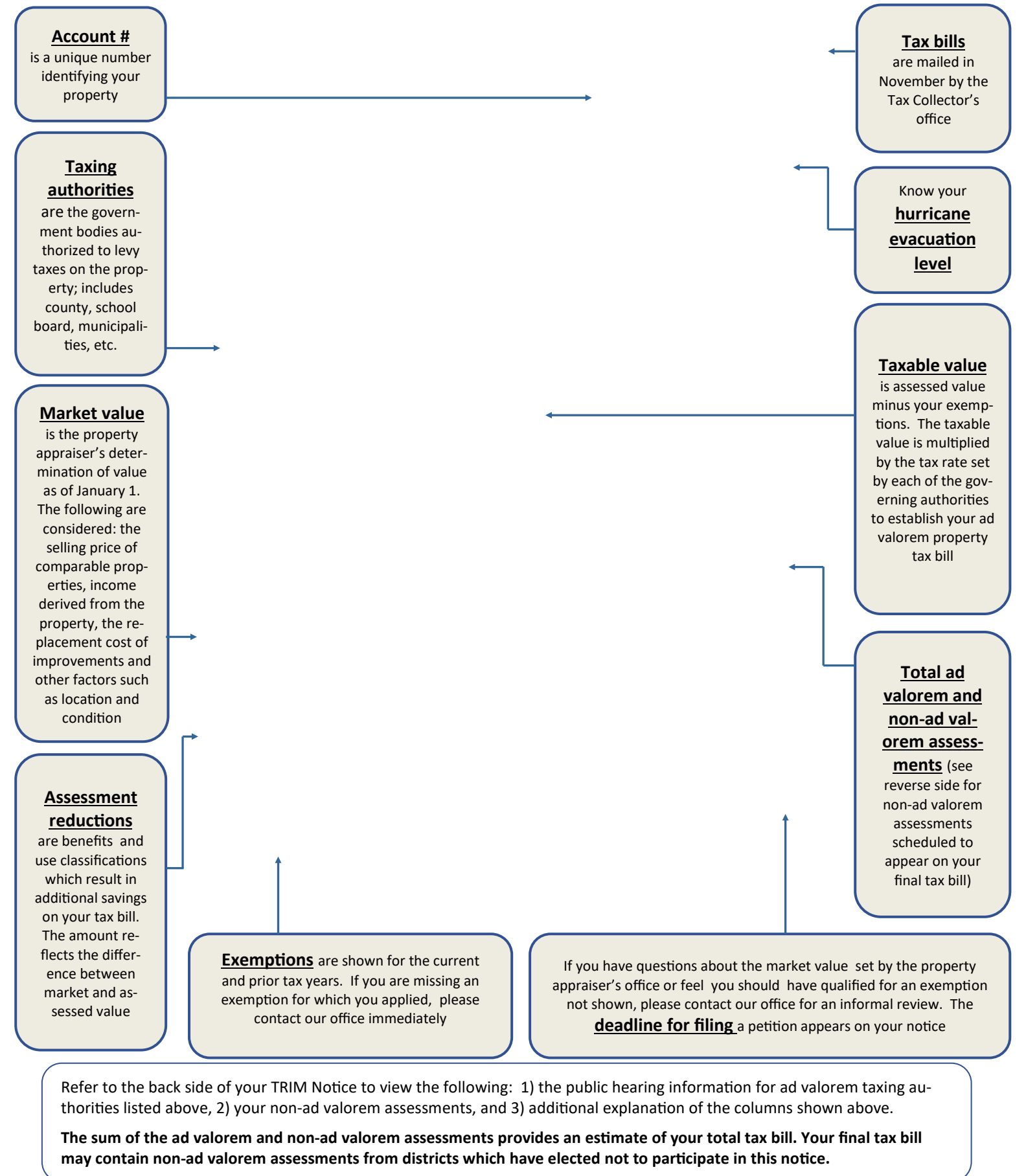
**2001 Adams Lane**

**Sarasota, FL 34237**

**or**

**PA@sc-pa.com**

## Notice of Proposed Property Taxes (TRIM Notice) Guide



PRINT JOB #3, 5 MAILING  
#9 BUSINESS REPLY MAIL  
RETURN ENVELOPE  
  
ENVELOPE PROJECT  
REF# A

**BUSINESS REPLY MAIL**  
FIRST-CLASS MAIL PERMIT NO. 609 SARASOTA FL

POSTAGE WILL BE PAID BY ADDRESSEE

BILL FURST  
SARASOTA COUNTY PROPERTY APPRAISER  
COMMERCIAL DEPARTMENT  
2001 ADAMS LN  
SARASOTA FL 34237-9956



NO POSTAGE  
NECESSARY  
IF MAILED  
IN THE  
UNITED STATES



**CONFIDENTIAL**

Envelopes for SQA and Commercial Business Reply Mail will be the same addressee for future mailings.



NO POSTAGE  
NECESSARY  
IF MAILED  
IN THE  
UNITED STATES

**BUSINESS REPLY MAIL**

FIRST-CLASS MAIL PERMIT NO. 609 SARASOTA FL

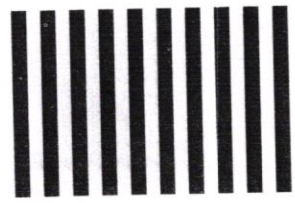
POSTAGE WILL BE PAID BY ADDRESSEE

BILL FURST  
SARASOTA COUNTY PROPERTY APPRAISER

SQA DEPARTMENT

2001 ADAMS LN

SARASOTA FL 34237-9956



**CONFIDENTIAL**



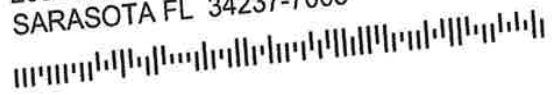
PRINT JOB #3, 5 MAILING  
#9 BUSINESS REPLY MAIL  
RETURN ENVELOPE  
  
ENVELOPE PROJECT REF# A

Envelopes for SQA and Commercial Business Reply Mail will be the same addressee for future mailings

PRINT JOB #1 RETURN  
ENVELOPE FOR AG  
CLASSIFICATION PACKET

ENVELOPE PROJECT REF#B

BILL FURST  
SARASOTA COUNTY PROPERTY APPRAISER  
AGRICULTURAL DEPARTMENT  
2001 ADAMS LANE  
SARASOTA FL 34237-7005



prints Black

#10  
Flap Position



**Bill Furst**  
SARASOTA COUNTY PROPERTY APPRAISER

2001 Adams Lane, Sarasota, FL 34237-70

SCPA/Edit: The +4  
zip code is no longer  
7090. Replace with  
7005 LMA 6.26.22

**Official Business**

Size:  
1-3/8 X 4-1/2  
Position:  
7/8 from left  
5/8 from bottom

**PROOF**

PRINT JOB #3,4,5,6 MAILING  
SCPA OFFICIAL BUSINESS  
ENVELOPE #10

ENVELOPE PROJECT REF# C

**PROOF**

9 X 12 Catalog  
Flap Position



**Bill Furst**  
SARASOTA COUNTY PROPERTY APPRAISER

2001 Adams Lane, Sarasota, FL 34237-7090

**Official Business**

PRINT JOB #1,3, MAILING  
SCPA OFFICIAL BUSINESS ENVELOPE  
9X12 WINDOW CATALOG

ENVELOPE PROJECT REF# D

Size:  
2 X 4  
Position:  
7/8 from left  
8-1/8 from bottom

prints **Black & 186**

**#10  
Flap Position**

**SARASOTA COUNTY  
TAXING AUTHORITIES**  
2001 Adams Lane  
Sarasota, Florida 34237-7005

Notice of Proposed Property Taxes and Proposed  
or Adopted Non-Ad Valorem Assessments  
***PLEASE READ CAREFULLY!***

**PROOF**

**FORWARDING SERVICE REQUESTED**

Size:  
1-5/8 X 4-1/2  
Position:  
5/8 from left  
1/2 from bottom

PRINT JOB #9 MAILING  
#10 TRIM WINDOW ENVELOPE

ENVELOPE PROJECT REF# E



9 X 12 Catalog  
Flap Position

SARASOTA COUNTY  
TAXING AUTHORITIES  
2001 Adams Lane  
Sarasota, Florida 34237-7005

**PROOF**

**FORWARDING SERVICE REQUESTED**

Size:  
2 X 4  
Position:  
7/8 from left  
8-1/8 from bottom

PRINT JOB #9 MAILING  
#10 TRIM WINDOW ENVELOPE

ENVELOPE PROJECT REF# F

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Notice of Proposed Property Taxes and Proposed  
or Adopted Non-Ad Valorem Assessments  
***PLEASE READ CAREFULLY!***

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