

**SUMTER COUNTY AGREEMENT FOR ON-CALL GRANT WRITING AND CONSULTING SERVICES FOR UNITED STATES OF AMERICA ECONOMIC DEVELOPMENT AGENCY (EDA) GRANT APPLICATIONS**

**THIS AGREEMENT** (hereinafter referred to as "Agreement") is made and entered into this 13<sup>th</sup> day of June, 2023, by and between **Board of Sumter County Commissioners** (hereinafter referred to as "Board," or "County"), whose address is 7375 Powell Road, Wildwood, Florida 34785, and LSI Business Development, Inc., (hereafter referred to as "Firm"), whose address is 1530 N. Layton Hills Pkwy, Ste. 201, Layton, Utah 84041.

**RECITALS**

WHEREAS, the Board has need of professional services for on-call grant writing and consulting services for the submission of U.S. Economic Development Agency grant opportunities; and

WHEREAS, the parties desire to enter into a written agreement outlining the duties, responsibilities and compensation of Firm, based on the Firm's response to a request by Sumter County.

NOW, THEREFORE, in consideration of the mutual promises, covenants and agreements contained herein, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

1. The relationship of the Firm to the Board will be that of a professional Firm and the Firm will provide the professional and technical services required under this Agreement in accordance with acceptable professional practices and ethical standards applicable to Firm's profession, and Firm will endeavor to provide to the Board prompt and efficient services to the best of its ability.
2. Firm is hereby retained as an on-call Sumter County professional grant writing and consultant and will work with the Board to provide services in accordance with the statement of work.
3. The term of this Agreement shall commence on July 1, 2023 and continue in full force through September 30, 2025, with the option to renew for two (2) additional one (1) year terms, unless otherwise terminated as provided in paragraph four (4) of this Agreement. The term of this Agreement does not relieve the Firm of any future responsibility as described in paragraph six (6) of this Agreement.
4. This Agreement may be terminated by either party upon thirty (30) days prior written notice to the other party at the address designated in this Agreement for receiving such notice. If this Agreement is terminated, Firm shall be authorized to receive payment for all work performed up to the date of termination.
5. With regard to compensation paid to Firm, Firm shall furnish to the Board a monthly invoice itemized pursuant to and in accordance with the Statement of Work Fees and Invoicing – Time & Materials Exhibit A attached hereto, and incorporated herein *in haec verba*. Each project will be defined and a not-to-exceed price will be agreed to. Firm shall submit all invoices pursuant to the Local Government Prompt Payment Act, F.S. 218. The Board shall pay to Firm all undisputed amounts of any invoice within thirty (30) days of the Board's receipt

of the invoice. If the Board objects to any invoice submitted by Firm, the Board shall so advise Firm in writing giving reasons therefor within seven (7) days of receipt of such invoice. If no such objection is made, the invoice will be considered acceptable to the Board. Firm acknowledges and agrees that the rates set forth in the Fee Schedule shall remain fixed throughout the duration of this Agreement, shall only be adjusted by mutual written agreement of both parties.

6. General Considerations.

- a. All reports, drawings, designs, specifications, notebooks, computations, details, and calculation documents prepared by Firm and presented to the Board pursuant to this Agreement are and remain the property of the Board as instruments of service. Notwithstanding the foregoing, any materials, including details, specifications, software (object code and source code), inventions, copyrights, patents, trade secrets, trademarks, and other proprietary rights, including ideas, concepts, and knowhow of Firm that existed before the commencement of the services and which are included in any deliverables generated by Firm under this Agreement (collectively, the "Pre-Existing Materials"), shall remain the property of Firm. Consultant grants to the Board (as an exception to the transfer and assignment provided in this Agreement) a non-exclusive, world-wide, royalty-free right and license to use the Pre-Existing Materials for completion of the project.
- b. Upon payment therefor, all analyses, data, documents, models, modeling, reports and tests performed or utilized by Firm shall be made available to the Board upon request and shall be considered public records.
- c. Firm is required to: (i) keep and maintain public records required by Board; (ii) upon request from Board's custodian of public records, provide Board with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a reasonable or as otherwise provided by law; (iii) 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 this Agreement and following completion of this Agreement if Firm does not transfer the records to Board; (iv) upon completion of this Agreement, transfer, at no cost, to Board all public records in possession of Firm or keep and maintain public records required by Board.
- d. If Firm transfers all public records to Board upon completion of this Agreement, Firm shall destroy any duplicate public records that are exempt or, confidential and exempt, from public records disclosure requirements. If Firm keeps and maintains public records upon completion of this Agreement, Firm shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to Board, upon request from Board's custodian of public records, in a format that is compatible with the information technology systems of Board.
- e. Firm shall keep all books, records, files, drawings, plans and other documentation, including all electronically stored items, which concern or relate to the services required hereunder (the "Records"), for a minimum of five (5) years from the date of expiration or termination of this Agreement, or as otherwise required by any applicable law, whichever date is later. The Board shall have the right to order, inspect, and copy all the Records as often as it deems necessary during any such period-of-time. The right to audit, inspect, and copy Records shall include all of the records of sub-Firms (if any).
- f. Firm shall, at all times, comply with the Florida Public Records Law, the Florida Open Meeting Law and all other applicable laws, rules and regulations of the State of Florida.
- g. **IF THE FIRM HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE FIRMS' DUTY TO**

**PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 352-689-4400, Sumter County Board of County Commissioners, 7375 Powell Road, Wildwood, Florida 34785 or via email at Records@sumtercountyfl.gov.**

- h. Firm shall, at all times, carry General Liability Insurance pursuant to the County's insurance requirements, including Board as an additional insured in each such policy.
  - i. Upon Firm's written request, the Board will furnish, or cause to be furnished, such reports, studies, instruments, documents, and other information as Firm and Board mutually deem necessary, and Firm may rely upon same in performing the services required under this Agreement. Firm shall not be liable for any errors, omissions, or deficiencies in Firm's services resulting from inaccurate or inadequate information furnished by the Board.
  - j. Firm is obligated by this agreement to comply with Section 20.055(5), Florida Statutes.
  - k. Any entity or affiliate who has had its Certificate of Qualification suspended, revoked, denied or have further been determined by the Department to be a non-responsive Firm may not submit a bid.
7. The Firm may be required to provide additional services to the Board on challenges, public protests, administrative hearings or similar matters. The Firm shall be available to represent the Board, serve as an expert witness, and provide supporting documentation as necessary. Should any other professional services be called for by the Board that are not otherwise set forth in this Agreement or any of its attachments or exhibits, charges for these services shall be agreed upon in advance by the parties hereto.
8. The Contract Documents, which comprise the entire Contract between Board and Firm and which are further incorporated herein by reference, consist of the following:
- a. This Agreement
  - b. Statement of Work
  - c. All Modifications and Change Orders Issued
9. Firm shall be solely and entirely responsible for its tortious acts and for the tortious acts of its employees during the performance of this Agreement. Firm shall indemnify and save harmless the Board, its employees and officers from and against all liabilities, claims, demands, or actions at law and equity including reasonable court costs and reasonable attorney's fees that may hereafter at any time be made or brought by anyone for the purposes of enforcing a claim on account of any injury or damage to the extent caused or occurring to any person or property in which was to the extent caused in whole or in part by any negligent acts, errors, or omissions of Firm or its employees during performance under this Agreement. The foregoing is not intended, and shall not be construed, as a waiver by Board of the benefits of Section 768.28, *Florida Statutes*.
10. Firm is, and shall be, in the performance of all services and activities under this Agreement, an independent Firm, and not an employee, agent, or servant of Board; and no provisions of Board's personnel policies shall apply to this Agreement. None of the benefits provided by Board to its employees including, but not limited to, worker's compensation insurance and unemployment insurance, are available from Board to Firm, or its employees, agents or servants. Firm assumes responsibility for payment of all federal, state and local taxes imposed or required of Firm including but not limited to FICA, FUTA, unemployment

insurance, Social Security and income tax laws for which Firm as employer is responsible. Firm shall be solely responsible for any worker's compensation insurance required by law and shall provide the Board with proof of insurance upon demand. The parties agree that Board shall not: (a) pay dues, licenses or membership fees for Firm; (b) require attendance by Firm, except as otherwise specified herein; (c) control the method, manner or means of performing under this Agreement, except as otherwise specified herein; or (d) restrict or prevent Firm from working for any other party.

11. **Force Majeure.** No party shall be liable or responsible to the other party, nor be deemed to have defaulted under or breached this Agreement, for any failure or delay in fulfilling or performing any term of this Agreement (except for any obligations to make payments to the other party hereunder), when and to the extent such failure or delay is caused by or results from the following force majeure events ("**Force Majeure Events**"): (a) acts of God; (b) flood, fire, earthquake or explosion; (c) war, invasion, hostilities (whether war is declared or not), terrorist threats or acts, riot, warlike operation, insurrection, rebellion, revolution, military or usurped power, sabotage or other civil unrest; (d) strikes, embargoes, blockades, labor stoppages, lockouts or slowdowns or other industrial disturbances or inability to obtain necessary materials or services (e) governmental delay regarding permits or approvals; (f) action by any governmental authority; (g) national or regional emergency; (h) shortage of adequate power or transportation facilities; or (j) other similar events beyond the reasonable control of the party impacted by the Force Majeure Event (the "**Impacted Party**") and provided further, however, that such performance shall be resumed and completed with due diligence and reasonable dispatch as soon as the contingency causing the delay or impossibility shall abate.
12. **Attorney's Fees; and Costs of Enforcement.** In the event suit is commenced to enforce this Agreement, reasonable costs of said suit including reasonable attorneys' fees in all proceedings, trials, investigations, appearances, appeals and in any bankruptcy proceeding or administrative proceeding shall be paid to the prevailing party by the non-prevailing party. In the event of default by either party hereto, the defaulting party shall be liable for all reasonable costs and expenses, including reasonable attorney's fees and costs incurred by the other party in enforcing its rights hereunder, whether litigation be instituted or not, at the trial court and appellate court level. Notwithstanding the foregoing, the prevailing party is the party who recovers at least 75% of its total claims in the suit or who is required to pay no more than 25% of the other party's total claims in the suit when considered in the totality of claims and counterclaims, if any. In claims for money damages, the total amount of recoverable attorney's fees and costs shall not exceed the net monetary award of the prevailing party.
13. **Law of the Agreement; Jurisdiction and Venue.** The Parties agree that the laws of the State of Florida shall govern any dispute arising from or related to this Agreement. The Parties to this Agreement agree that venue and jurisdiction is mandated to lie only in the state courts located in Sumter County, Florida. Removal of this case to federal court is not permitted. Litigation in federal court is precluded by agreement of the parties hereto. If, even though precluded by agreement of the Parties hereto, litigation arising from or based upon this contract should be mandated by a court of competent jurisdiction issued pursuant to a duly noticed hearing giving Sumter County adequate time to respond and all of the benefits of due process to lie in the proper venue or jurisdiction of a federal court, that federal court shall only be in the Middle District of Florida, Ocala Division. The Parties further agree that entry into this agreement constitutes irrevocable consent that the exclusive venue for any such dispute shall lie solely in the state or county courts in and for Sumter County, Florida. The

Parties expressly and irrevocably waive any right(s) to removal of any such dispute to any federal court, unless the federal court has exclusive jurisdiction; in such cases, the parties agree that the exclusive venue for any such disputes shall be the United States District Court, in and for the Middle District of Florida, Ocala Division. Process in any action or proceeding referred to in this paragraph may be served on any party anywhere in the world, such party waives any argument that said party is not subject to the jurisdiction of the state courts located in Sumter County, Florida and that the laws of the state of Florida.

14. **Entire Agreement.** This Agreement contains the entire agreement of the Parties and may not be changed except by written agreement duly executed by the Parties hereto. This Agreement supersedes any prior understandings or agreements between the Parties, and there are no representations, warranties, or oral agreements other than those expressly set forth herein.
15. **Assignment.** This Agreement shall not be assigned nor may any portion of the obligations contemplated in this Agreement be subcontracted to another party without prior written approval of County. No such approval by County of any assignment or subcontract shall be deemed in any event or in any manner to provide for the incurrence of any obligation of County. All such assignments and subcontracts shall be subject to the terms and conditions of this Agreement and to any conditions of approval that County shall deem necessary.
16. **Compliance with Licenses, Permits, and Applicable Laws.** In performing services hereunder, Firm shall comply with all applicable and non-conflicting federal, state and local laws and regulations. Firm shall be responsible for identifying and obtaining all permits necessary to complete the scope of services. Firm shall be responsible for obtaining, at its sole cost and expense, all necessary license licenses and other governmental approvals required in order for Firm to provide the type of services required hereunder. If any discrepancy or inconsistency should be discovered between the specifications established for the services and any law, regulation, ordinance, order or decree applicable to the services, Firm will immediately report such discrepancy or inconsistency to the Board and will conform its work to any orders or instructions issued by the Board.
17. **E-Verify:** system established by the U.S. Department of Homeland Security to determine the immigration and work-eligibility status of prospective employees.
18. The Firm agrees to certify to the Board that Firm is in compliance with the federal E-Verify program, including obtaining written certification from all sub-Firms who will participate in the performance of scope of services contemplated in this Agreement. All sub-Firm certifications must be kept on file by the Firm and made available to the state and/or the Board upon request. The Board reserves the right to take action against any Firm deemed to be non-compliant; potential actions may include, but are not limited to, cancellation of this Agreement and/or suspending or debaring the Firm from performing services for the County.
19. **Conflict of Interest.** Firm shall notify Board in writing of any commitments during the term of this Agreement which may constitute a potential or actual conflict of interest with respect to the scope of services to be performed for the Board.
20. **Corporate Status; Change of Ownership.** If Firm is a non-governmental, corporate entity:
  - a. *Corporate Status.* Firm shall ensure that the corporate status shall continuously be in good standing and active and current with the state of its incorporation and the State

of Florida and at all times throughout the Term, and any renewal or extension hereof. Failure of the Firm to keep its corporate status active and current shall constitute a material breach under the terms of this Agreement.

- b. *Change of Ownership.* Firm shall notify County immediately upon any change in corporate ownership or any substitution of the key professional assigned (the "Key Person") to perform under this Agreement ("Change of Ownership"). County shall have the option of cancelling this Agreement if a Change of Ownership is not suitable to it, provided however, no cancellation shall relieve the Firm for liability for breach of same. A Change of Ownership means the occurrence of any one or more of the following: a sale, lease, or other disposition of 50% or more of the interest or assets of the company or corporation; a merger, reverse merger or consolidation with another entity; a transaction wherein a third-party becomes the beneficial owner having fifty (50%) percent or more interest in the corporation or company; or fifty (50%) percent or more of the total number of votes that may be cast for any act of the entity.

21. **Default.** Neither Party shall declare the other party in default of any provision of this Agreement without giving the other party at least ten (10) days advance written notice of intention to do so, during which time the other party shall have the opportunity to remedy the default. The notice shall specify the default with particularity.
22. **Dispute Resolution.** All disputes arising out of or in connection with this Agreement shall be attempted to be settled through good-faith negotiation between the Parties, followed if necessary within thirty (30) days by professionally-assisted mediation. Any mediator so designated must be acceptable to each Party. The mediation will be conducted as specified by the mediator and agreed upon by the Parties. The Parties agree to discuss their differences in good faith and to attempt, with the assistance of the mediator, to reach an amicable resolution of the dispute. The mediation will be treated as a settlement discussion and therefore will be confidential. The mediator may not testify for either Party in any later proceeding relating to the dispute. No recording or transcript shall be made of the mediation proceedings. Each Party will bear its own costs in the mediation. The fees and expenses of the mediator will be shared equally by the Parties. Failing resolution through negotiation or mediation, either Party may file an action in a court of competent jurisdiction or other appropriate remedy available in law or equity as defined herein below.
23. **Jointly Drafted.** The Parties agree that this Agreement is entered into knowingly and voluntarily, after having the opportunity to fully discuss it with an attorney. Having had the opportunity to obtain the advice of legal counsel to review, comment upon, and redraft this Agreement, the Parties agree that this Agreement shall be construed as if the parties jointly prepared it so that any uncertainty or ambiguity shall not be interpreted against any one party and in favor of the other.
24. **Parties Acknowledgement; Parties Bound.** The Parties acknowledge that they have read this Agreement, and that they understand the terms and conditions herein and that the terms have been fully and completely explained to the Parties prior to the execution thereof. Each party acknowledges that the other party has made no warranties, representations, covenants, or agreements, express or implied, except as expressly contained in this Agreement. Further, the Parties have caused this Agreement to be executed on their respective behalf by the authorized officer whose signature appears below under their respective name, to be effective as of the date first written above. This Agreement shall inure to the benefit of and be binding upon the Parties, their successors, heirs, and personal

representatives.

25. **Waiver.** The waiver by any party hereto of a breach of any provision of this Agreement shall not operate or be construed as a waiver of any subsequent breach by any party.
26. **Time is of the Essence.** Time shall be of the essence of this Agreement, subject, however, to the Standard of Care.
27. **Survivability.** Any provision of this Agreement, which obligates any of the Parties to perform an obligation either before the commencement of the Term or after the expiration of the Term, or any renewal or extension thereof, shall be binding and enforceable notwithstanding that performance is not within the Term, and the same shall survive.
28. **Severability.** Whenever possible each provision and term of this Agreement will be interpreted in a manner to be effective and valid but if any provision or term of this Agreement is held to be prohibited or invalid, then such provision or term will be ineffective only to the extent of such prohibition or invalidity, without invalidating or affecting in any manner whatsoever the remainder of such provision or term or the remaining provisions or terms of this Agreement.
29. **Counterparts.** This Agreement may be executed in a number of identical counterparts and a facsimile or electronic/digital copy shall be treated as an original. If so executed, each of such counterparts is to be deemed an original for all purposes, and all such counterparts shall, collectively, constitute one agreement. In making proof of this Agreement, it shall not be necessary to produce or account for more than one such counterpart.
30. **Section and Paragraph Headings.** Captions or paragraph headings herein contained are for organizational convenience only and shall not be constructed as material provisions of this agreement or to limit any provisions hereunder.
31. **Cooperation; Supplementary Actions.** All Parties agree to cooperate fully and to execute any supplementary documents, and to take any additional actions that may be necessary or appropriate to give full force and effect to the basic terms and intent of this Agreement, and which are not inconsistent with its terms.
32. **Miscellaneous.** Whenever the context shall so require, all words in this Agreement of one gender shall be deemed to include the other gender.
33. **Incorporation of Recitals.** Each of the WHEREAS clauses listed above are hereby re-alleged and incorporated into this Agreement as if otherwise fully stated herein.
34. **Notice.** Whenever any notice, demand or request is required or permitted hereunder, such notice, demand or request shall be made in writing and shall be personally delivered to the individuals listed below, sent via prepaid courier or overnight courier, or deposited in the United States mail, registered or certified, return receipt requested, postage prepaid, addressed to the addresses (and individuals) set forth below. No other form of electronic communications (Facebook, Twitter, Text) will be deemed Notice.

FOR THE BOARD

FOR THE FIRM

Name: Bradley S. Arnold

Name: Sarah Bertagnolli

Address: 7375 Powell Road, Wildwood, FL 34785

Address: 1530 N Layton Pkwy, Layton, UT 84041

Title: County Administrator

Title: Chief Technology & Operations Officer

Date:

Date: 05/17/2023

IN WITNESS WHEREOF, the parties have signed this agreement the day and year first above written.

ATTEST:

SUMTER COUNTY  
BOARD OF COUNTY COMMISSIONERS

By: \_\_\_\_\_

\_\_\_\_\_

By: Chairman

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

ATTEST:

LSI BUSINESS DEVELOPMENT, INC.

By: Heather Anderson

Heather Anderson

By: Contracts Coordinator

Date Signed: 05/17/2023



# Statement of Work Template

Statement of Work (“SOW”) for the Master Services Agreement between LSI Business Development, Inc. (“LSI”), and \_\_\_\_\_ dated \_\_\_\_\_ (the “Agreement”).

This SOW is dated \_\_\_\_\_.

This SOW is to document the requirements, specifications, implementation approach, deliverables, pricing and other rights and obligations of the parties hereto, subject to the Agreement.

Capitalized terms not defined in this SOW have the meaning defined in the Agreement.

**1. Period of Performance.**

\_\_\_\_\_ - \_\_\_\_\_

**2. Description of Work.**

Section Two - Project Details

LSI will provide the client with the following:

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**3. Fees and Invoicing – Time & Materials (T&M).**

Invoicing will be based upon T&M

Item No.	Description	Rate	NTE Hours	Total Cost
01	Grant Program Manager	\$150	TBD	TBD
02	Grant Writer & DTP	\$110	TBD	TBD
03	Grant Researcher	\$85	TBD	TBD

04	Subject Matter Experts (Industry Specific, if Requested by Client	\$150 - \$210	TBD	TBD
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**Total**  
TBD

**4. Fees and Invoicing – Firm-Fixed Price (FFP).**

Invoicing will be based upon FFP

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**Total**  
TBD

**5. General Terms.**

- **Confidential Information.**  
The Parties understand that the terms and conditions of the Agreement regarding Confidential Information apply to this SOW and the work performed under this SOW.
- **Termination.**  
This SOW may be terminated in accordance with Section 4 of the Agreement.
- **Counterparts.**  
This SOW may be executed in one or more counterparts, each of which shall be deemed an original, but both of which together shall constitute one and the same instrument.
- **Entire Agreement.**  
This SOW and the Agreement constitute the entire agreement between the Parties with respect to the subject matter hereof and supersede all other written or oral agreements or understandings between the Parties with respect thereto.
- **Amendments.**  
This SOW may be amended only by a written agreement signed by an authorized officer of each Party.

This SOW is issued under and incorporated into the Agreement made by and between LSI and Client on the Effective Date thereof and is subject to the terms and conditions provided therein.

Upon signature below by an authorized officer of each Party, this SOW shall be effective as of the date of the last Party to sign.

**Company**

**LSI Business Development Inc.**