

INVITATION TO SUBMIT

P R O P O S A L

REQUEST FOR PROPOSALS - RFP NO.: 15-0063-7

INSURANCE AGENT/BROKER SERVICES

PRE-PROPOSAL CONFERENCE: 2:00 P.M., July 28, 2015

PROPOSALS RECEIVED BY: 5:00 P.M., August 11, 2015

THE COMMISSIONERS OF CHATHAM COUNTY, GEORGIA

ALBERT J. SCOTT, CHAIRMAN

COMMISSIONER HELEN L. STONE

COMMISSIONER JAMES J. HOLMES

COMMISSIONER TONY CENTER

COMMISSIONER PATRICK K. FARRELL

COMMISSIONER YUSUF K. SHABAZZ

COMMISSIONER LORI L. BRADY

COMMISSIONER DEAN KICKLIGHTER

COMMISSIONER PRISCILLA D. THOMAS

R. JONATHAN HART, COUNTY ATTORNEY

CHATHAM COUNTY, GEORGIA

DOCUMENT CHECK LIST

The following documents, when marked, are contained in and made a part of this Package or are required to be submitted with the qualification proposal. It is the responsibility of the Proposer to read, complete and sign, where indicated, and return these documents with his/her qualification proposal. FAILURE TO DO SO MAY BE CAUSE FOR DISQUALIFICATION.

X GENERAL INFORMATION

X PROPOSAL

X SCOPE OF SERVICES

X LEGAL NOTICE

X ATTACHMENTS: A. DRUG FREE WORKPLACE; B. NONDISCRIMINATION STATEMENT; C. DISCLOSURE OF RESPONSIBILITY STATEMENT; D. CONTRACTOR & SUBCONTRACTOR AFFIDAVIT AND AGREEMENT E. BIDDER'S CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION; F. M/WBE COMPLIANCE REPORT; G. SAVE AFFIDAVIT; H. LOBBYING AFFIDAVIT.

The undersigned bidder certifies that he/she has received the above listed and marked documents and acknowledges that his/her failure to return each, completed and signed as required, may be cause for disqualifying his/her bid.

BY: _____ **DATE:** _____
SIGNATURE: **DATE:**

TITLE:

COMPANY:

ACKNOWLEDGE RECIEPT OF ADDENDUM(S) _____

Chatham County has established goals to increase participation of minority and woman owned businesses. In order to accurately document participation, businesses submitting bids or proposals are encouraged to report ownership status. A minority or woman owned business is defined as a business with 51% or greater minority or female ownership. Please check ownership status as applicable:

African-American _____ **Asian American** _____ **Hispanic** _____

Native American or Alaskan Indian _____ **Female** _____

**CHATHAM COUNTY, GEORGIA
OFFICE OF THE PURCHASING DIRECTOR
1117 EISENHOWER DRIVE, SUITE C
SAVANNAH, GEORGIA 31406
(912) 790-1623**

DATE: July 8, 2015

RFP NO.: 15-0063-7

GENERAL INFORMATION FOR REQUEST FOR QUALIFICATIONS

This is an invitation to submit a proposal to supply Chatham County with services as indicated herein. Sealed proposals will be received at the Office of the Purchasing Director, **1117 EISENHOWER DRIVE, SUITE C, and SAVANNAH, GEORGIA** up to **5:00 P.M., August 11, 2015**. The Purchasing Director reserves the right to reject any and all proposals and to waive formalities.

Instructions for preparation and submission of a qualification proposal are contained in the Request for Proposal package. Please note that specific forms for submission of a proposal are required. Proposals must be typed or printed in ink

A **pre-proposal conference** has been scheduled for **2:00 P.M., July 28, 2015** and be held at the **Chatham County Purchasing and Contracting Department, 1117 Eisenhower Drive, Suite C, Savannah, Georgia**, to discuss the specifications and resolve any questions and/or misunderstanding that may arise.

Any changes to the conditions and specifications must be in the form of a written addendum to be valid; therefore, the Purchasing Director will issue a written addendum to document approved changes.

Chatham County has an equal opportunity procurement policy. Chatham County seeks to ensure that all segments of the business community have access to providing services needed by County programs. The County affirmatively works to encourage utilization of disadvantaged and minority business enterprises in our procurement activities. The County provides equal opportunity for all businesses and does not discriminate against any persons or businesses regardless of race, color, religion, age, sex, national origin or handicap. The County expects its contractors to make maximum feasible use of minority businesses and qualified minority employees. The terms "disadvantaged business", "minority business enterprise", and "minority person" are more specifically defined and explained in the Chatham County Purchasing Ordinance and Procedures Manual, Article VII - Disadvantaged Business Enterprises Program.

All firms requesting to do business with Chatham County **must register** on-line at <http://purchasing.chathamcounty.org>. The County's Purchasing Division is interested in fostering participation by all qualified business persons offering commodities and services. For additional information please contact Purchasing and Contracting at 912-790-1620.

SECTION I
INSTRUCTIONS TO PROPOSERS

1.1 **PURPOSE:** The purpose of this document is to provide general and specific information for use in submitting a qualification proposal to supply Chatham County with services as described herein. All proposals are governed by the Code of Chatham County, Chapter 4, Article IV, and the laws of the State of Georgia.

1.2 **HOW TO PREPARE PROPOSALS: All proposals shall be:**

- A. Typewritten or completed with pen and ink, signed by the business owner or authorized representative, with all erasures or corrections initialed and dated by the official signing the proposal. ALL SIGNATURE SPACES MUST BE SIGNED.

Proposers are encouraged to review carefully all provisions and attachments of this document prior to submission. Each proposal constitutes an offer and may not be withdrawn except as provided herein.

1.3 **HOW TO SUBMIT PROPOSALS: All proposals shall be:**

- A. Submitted in sealed opaque envelopes, plainly marked with the proposal number and title, date and time for submission, and company name.
- B. Mailed or delivered as follows in sufficient time to ensure receipt by the Purchasing Director on or before the time and date specified above.
- a. **Mailing Address: Purchasing Director, 1117 Eisenhower Drive, Suite C, Savannah, Georgia 31406.**
- b. **Hand Delivery: Purchasing Director, 1117 Eisenhower Drive, Suite C, Savannah, Georgia.**

PROPOSALS NOT RECEIVED BY THE TIME AND DATE SPECIFIED WILL NOT BE OPENED OR CONSIDERED.

1.4 **HOW TO SUBMIT AN OBJECTION:** Objections from Offerers to this Request for Proposals and/or these specifications should be brought to the attention of the County Purchasing Director in the following manner:

- A. When a pre-proposal conference is scheduled, the Proposer may object in writing any time prior to or at the pre-proposal conference.
- B. When a pre-proposal conference is not scheduled, the Proposer shall object in writing not less than five (5) days prior to the Date for submission.
- C. The objections contemplated must pertain both to form and substance of the

Request for Proposal documents. Failure to object in accordance with the above procedure will constitute a waiver on the part of the business to protest this Request for Proposal.

- 1.5 **FAILURE TO OFFER:** Proposers should indicate if they would like to be removed from the County's vendor list.
- 1.6 **ERRORS IN PROPOSALS:** Proposers or their authorized representatives are expected to fully inform themselves as to the conditions, requirements, and specifications before submitting proposals. Failure to do so will be at the Proposer's own risk.
- 1.7 **STANDARDS FOR ACCEPTANCE OF PROPOSERS FOR CONTRACT AWARD:** The County reserves the right to reject any or all Proposals and to waive any irregularities or technicalities in Proposals received whenever such rejection or waiver is in the best interest of the County. The County reserves the right to reject the Offer of a Proposer who has previously failed to perform properly or complete on time contracts of a similar nature, whom investigation shows is not in a position to perform the contract.
- 1.8 **PROPOSER:** Whenever the term "Proposer" is used it shall encompass the "person", "business", "firm", or other party submitting a proposal to Chatham County in such capacity before a contract has been entered into between such party and the County.
- 1.9 **COMPLIANCE WITH LAWS:** The Proposer shall obtain and maintain all licenses, permits, liability insurance, workman's compensation insurance and comply with any and all other standards or regulations required by Federal, State or County statute, ordinances and rules during the performance of any contract between the Proposer and the County. Any such requirement specifically set forth in any contract document between the Proposer and the County shall be supplementary to this section and not in substitution thereof.
- 1.10 **CONTRACTOR:** Contractor or subcontractor means any person, firm, or business having a contract with Chatham County. The Contractor of goods, material, equipment or services certifies that the firm will follow equal employment opportunity practices in connection with the awarded contract as more fully specified in the contract documents.
- 1.11 **LOCAL PREFERENCE:** The Contractor agrees to follow the local preference guidelines as specified in the contract documents, which state "The CONTRACTOR hereby agrees, as part of the consideration to Chatham County for making this Contract, that the CONTRACTOR in the carrying out of this contract will give the citizens of Chatham County preference for employment to perform all labor required by this contract; that the rate of wages to be paid shall not be less than legally required; and that in the purchase of materials to be used in the Work of the Project, preference shall be given to sources from within Chatham County to the maximum extent possible. The CONTRACTOR will cause the forgoing provisions to be inserted in all subcontracts so that provisions will be binding upon each subcontractor."
- 1.12 **DEBARRED FIRMS AND PENDING LITIGATION:** Any potential proposer/firm listed on the Federal or State of Georgia Excluded Parties Listing (Barred from doing

business) **will not** be considered for contract award. Proposers **shall disclose** any record of pending criminal violations (Indictment) and/or convictions, pending lawsuits, etc., and any actions that may be a conflict of interest occurring within the past five (5) years. Any proposer/firm previously defaulting or terminating a contract with the County will not be considered.

** All bidders or proposers are to read and complete the Disclosure of Responsibility Statement enclosed as an Attachment to be returned with response. Failure to do so may result in your solicitation response being rejected as non-responsive.

Bidder acknowledges that in performing contract work for the Board, bidder shall not utilize any firms that have been a party to any of the above actions. If bidder has engaged any firm to work on this contract or project that is later debarred, Bidder shall sever its relationship with that firm with respect to Board contract.

- 1.13 **PERFORMANCE EVALUATION:** On April 11, 2008, the Chatham County Board of Commissioners approved a change to the County Purchasing Ordinance requiring Contractor/Consultant Performance Evaluations, as a minimum, annually, prior to contract anniversary date.

Should Contractor/Consultant performance be unsatisfactory, the appointed County Project Manager for the contract may prepare a Contractor/Consultant Complaint Form or a Performance Evaluation to the County Purchasing Director.

SECTION II

PROPOSAL CONDITIONS

- 2.1 **SPECIFICATIONS:** Any obvious error or omission in specifications shall not inure to the benefit of the bidder but shall put the Proposer on notice to inquire of or identify the same to the County.
- 2.2 **MULTIPLE PROPOSALS:** No Proposer will be allowed to submit more than one offer. Any alternate proposals must be brought to the Purchasing Director's attention during the Pre-proposal Conference or submitted in writing at least five (5) days preceding the date for submission of proposals.
- 2.3 **OFFERS TO BE FIRM:** The Proposer warrants that terms and conditions quoted in his offer will be firm for acceptance for a period of sixty (60) days from bid date submitted, unless otherwise stated in the proposal. When requested to provide a fee proposal, fees quoted must also be firm for a sixty day period.
- 2.4 **COMPLETENESS:** All information required by the Request for Proposals must be completed and submitted to constitute a proper proposal.
- 2.5 **LIABILITY PROVISIONS:** Where Proposers are required to enter or go into Chatham

County property to take measurements or gather other information in order to prepare the proposal as requested by the County, the Proposer shall be liable for any injury, damage or loss occasioned by negligence of the Proposer, his agent, or any person the Proposer has designated to prepare the Offer and shall indemnify and hold harmless Chatham County from any liability arising therefrom. The contract document specifies the liability provisions required of the successful Proposer in order to be awarded a contract with Chatham County.

2.6 CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: By submission of this Offer, the Proposer certifies, and in the case of a joint offer each party thereto certifies as to its own organization, that in connection with this procurement:

- (1) The prices in this offer have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other competitor;
- (2) Unless otherwise required by law, the prices which have been quoted in this offer have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by the Proposer prior to opening, directly or indirectly to any other competitor; and
- (3) No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not submit an offer for the purpose of restricting competition.

2.7 AWARD OF CONTRACT: The contract, if awarded, will be awarded to that responsible Proposer whose proposal will be most advantageous to Chatham County, price and other factors considered. The Board of Commissioners will make the determination as to which proposal best serves the interest of Chatham County.

2.8 PROCUREMENT PROTESTS: Objections and protests to any portion of the procurement process or actions of the County staff may be filed with the Purchasing Director for review and resolution. The Chatham County Purchasing Procedures Manual, Article IX - Appeals and Remedies shall govern the review and resolution of all protests.

2.9 QUALIFICATION OF BUSINESS (RESPONSIBLE PROPOSER): A responsible Proposer is defined as one who meets, or by the date of the acceptance can meet, all requirements for licensing, insurance, and service contained within this Request for Proposals. Chatham County has the right to require any or all Proposers to submit documentation of the ability to perform the service requested.

Chatham County has the right to disqualify the proposal of any Proposer as being unresponsive or irresponsible whenever such Proposer cannot document the ability to deliver the requested service.

2.10 COUNTY TAX CERTIFICATE REQUIREMENT: A current Chatham County or municipal business license (within the State of Georgia) is required unless otherwise

specified. A firm need not have a Chatham County Business License prior to submitting a proposal. However, a license must be obtained by the successful vendor prior to award of contract.

Please contact the Chatham County Department of Building Safety and Regulatory Services at (912) 201-4300 for additional information.

NOTE: No contract shall be awarded unless all real and personal property taxes have been paid by the successful contractor and/or subcontractors as adopted by the Board of Commissioners on 8 April 1994.

2.11 INSURANCE PROVISIONS, GENERAL: The selected CONTRACTOR shall be required to procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives, employees or subcontractors. The cost of such insurance shall be included in the Bid. It is every Contractor's responsibility to provide the County Purchasing and Contracting Division current and up-to-date Certificates of Insurance and Declaration Sheets for multiple year contracts before the end of each term. **Failure to do so may be cause for termination of contract.**

2.11.1 General Information that shall appear on a Certificate of Insurance:

- I. Name of the Producer (Contractor's insurance Broker/Agent).
- II. Companies affording coverage (there may be several).
- III. Name and Address of the Insured (this should be the Company or Parent of the firm Chatham County is contracting with).
- IV. Summary of all current insurance for the insured (includes effective dates of coverage).
- V. A brief description of the operations to be performed, the specific job to be performed, or contract number.
- VI. Certificate Holder (This is to always include Chatham County).

Chatham County as an "Additional Insured": Chatham County invokes the defense of "sovereign immunity." In order not to jeopardize the use of this defense, the County **is not** to be included as an "Additional Insured" on insurance contracts.

2.11.2 Minimum Limits of Insurance to be maintained for the duration of the contract:

- A. **Commercial General Liability:** Provides protection against bodily injury and property damage claims arising from operations of a Contractor or Tenant. This policy coverage includes: premises and operations, use of independent contractors, products/completed operations, personal injury, contractual, broad form property damage, and underground, explosion and collapse hazards. Minimum limits: \$1,000,000 bodily injury and property damage per occurrence and annual aggregate.

- B. **Worker's Compensation and Employer's Liability:** Provides statutory protection against bodily injury, sickness or disease sustained by employees of the Contractor while performing within the scope of their duties. Employer's Liability coverage is usually included in Worker's Compensation policies, and insures common law claims of injured employees made in lieu of or in addition to a Worker's Compensation claim. Minimum limits: \$500,000 for each accident, disease policy limit, each employee and Statutory Worker's Compensation limit.
- C. **Business Automobile Liability:** Coverage insures against liability claims arising out of the Contractor's use of automobiles. Minimum limit: \$1,000,000 combined single limit per accident for bodily injury and property damage. Coverage should be written on an "Any Auto" basis.

2.11.3 Special Requirements:

- A. **Claims-Made Coverage:** The limits of liability shall remain the same as the occurrence basis, however, the Retroactive date shall be prior to the coincident with the date of any contract, and the Certificate of Insurance shall state the coverage is claims-made. The Retroactive date shall also be specifically stated on the Certificate of Insurance.
- B. **Extended Reporting Periods:** The Contractor shall provide the County with a notice of the election to initiate any Supplemental Extended Reporting Period and the reason(s) for invoking this option.
- C. **Reporting Provisions:** Any failure to comply with reporting provisions of the policies shall not affect coverage provided in relation to this request.
- D. **Cancellation:** Each insurance policy that applies to this request shall be endorsed to state that it shall not be suspended, voided, or canceled, except after thirty (30) days prior to written notice by certified mail, return receipt requested, has been given to the County.
- E. **Proof of Insurance:** Chatham County shall be furnished with certificates of insurance and with original endorsements affecting coverage required by this request. The certificates and endorsements are to be signed by a person authorized by the insurer to bind coverage on its behalf. All certificates of insurance are to be submitted prior to, and approved by, the County before services are rendered. The Contractor must ensure Certificate of Insurance are updated for the entire term of the County.
- F. **Insurer Acceptability:** Insurance is to be placed with an insurer having an A.M. Best's rating of A and a five (5) year average financial rating of not less than V. If an insurer does not qualify for averaging on a five year basis, the current total Best's rating will be used to evaluate insurer

acceptability.

G. **Lapse in Coverage:** A lapse in coverage shall constitute grounds for contract termination by the Chatham County Board of Commissioners.

H. **Deductibles and Self-Insured Retention:** Any deductibles or self-insured retention must be declared to, and approved by, the County. At the option of the County, either: the insurer shall reduce or eliminate such deductibles or self-insured retention as related to the County, its officials, officers, employees, and volunteers; or the Contractor shall procure a bond guaranteeing payment of related suits, losses, claims, and related investigation, claim administration and defense expenses.

2.11.4 Additional Coverage for Specific Procurement Projects:

Professional Liability: Insure errors or omission on behalf of architects, engineers, attorneys, medical professionals, and consultants.

<u>Minimum Limits:</u>	\$1 million per claim/occurrence.
<u>Coverage Requirement:</u>	If “claims-made,” retroactive date must precede or coincide with the contract effective date or the date of the Notice to Proceed. The professional must state if “tail” coverage has been purchased and the duration of the coverage.

2.12 INDEMNIFICATION: The PROPOSER agrees to protect, defend, indemnify, and hold harmless Chatham County, Georgia, its commissioners, officers, agents, and employees from and against any and all liability, damages, claims, suits, liens, and judgments, of whatever nature, including claims for contribution and/or indemnification, for injuries to or death of any person or persons, or damage to the property or other rights of any person or persons caused by the PROPOSER or its subproposers. The PROPOSER’s obligation to protect, defend, indemnify, and hold harmless, as set forth herein above shall include, but not be limited to, any matter arising out of any actual or alleged infringement of any patent, trademark, copyright, or service mark, or any actual or alleged unfair competition, disparagement of product or service, or other business tort of any type whatsoever, or any actual or alleged violation of trade regulations. PROPOSER further agrees to investigate, handle, respond to, provide defense for, and to protect, defend, indemnify, and hold harmless Chatham County, Georgia, at his sole expense, and agrees to bear all other costs and expenses related thereto, even if such claims, suits, etc., are groundless, false, or fraudulent, including any and all claims or liability for compensation under the Worker's Compensation Act arising out of injuries sustained by any employee of the PROPOSER or his subcontractors or anyone directly or indirectly employed by any of them.

The PROPOSER’s obligation to indemnify Chatham County under this Section shall not be limited in any way by the agreed-upon contract price, or to the scope and amount of

coverage provided by any insurance maintained by the PROPOSER.

- 2.13 COMPLIANCE WITH SPECIFICATION - TERMS AND CONDITIONS:** The Request for Proposals, Legal Advertisement, General Conditions and Instructions to Proposers, Specifications, Special Conditions, Proposers Offer, Addendum, and/or any other pertinent documents form a part of the Offeror's proposal and by reference are made a part hereof.
- 2.14 SIGNED RESPONSE CONSIDERED AN OFFER:** The signed Response shall be considered an offer on the part of the Proposer, which offer shall be deemed accepted upon approval by the Chatham County Board of Commissioners, Purchasing Director or his designee. In case of a default on the part of the Proponent after such acceptance, Chatham County may take such action as it deems appropriate, including legal action for damages or lack of required performance.
- 2.15 NOTICE TO PROCEED:** The successful proposer shall not commence work under this Request for Proposal until a written contract is awarded and a Notice to Proceed is issued by the Purchasing Director or his designee. If the successful Proposer does commence any work or deliver items prior to receiving official notification, he does so at his own risk.
- 2.16 PAYMENT TO CONTRACTORS:** Instructions for invoicing the County for service delivered to the County are specified in the contract document.
- A. Questions regarding payment may be directed to the Finance Department at (912) 652-7905 or the County's Project Manager as specified in the contract documents.
 - B. Contractors will be paid the agreed upon compensation upon satisfactory progress or completion of the work as more fully described in the contract document.
 - C. Upon completion of the work, the Contractor will provide the County or contractor with an affidavit certifying all suppliers, persons or businesses employed by the Contractor for the work performed for the County have been paid in full.
 - D. Chatham County is a tax exempt entity. Every contractor, vendor, business or person under contract with Chatham County is required by Georgia law to pay State sales or use taxes for products purchased in Georgia or transported into Georgia and sold to Chatham County by contract. Please consult the State of Georgia, Department of Revenue, Sales and Use Tax Unit in Atlanta (404) 656-4065 for additional information.
- 2.17 LICENSES, PERMITS, AND TAXES:** The price or prices for the service shall include full compensation for all fees that the proponent is or may be required to pay. Chatham County is Tax Exempt. A Tax Exemption Certificate will be provided by the Purchasing & Contracting Office upon request (912) 790-1623.
- 2.18 MINORITY – WOMEN BUSINESS ENTERPRISE PARTICIPATION:** It is the desire of the County Board of Commissioners to increase the participation of minority

(MBE) and women-owned (WBE) business in its contracting and procurement programs. The County is committed to a policy of equitable participation for these firms by setting goals for each contract. Bidder/proposers are requested to include in their proposals a narrative describing their past accomplishment and intended actions in this area. If bidder/proposers are considering minority or women owned enterprise participation in their proposal, those firms, and their specific duties must be identified in their proposal along with the percentage(s) and dollar amount awarded to the M/WBE firm. Proposers may also provide demographic information regarding their employees to show their commitment to equal opportunity. If a bidder/proposer is considered for award, he/she will be asked to meet with the County Staff so that the intended MBE/WBE participation goals can be formalized and included in the subsequent contact.

If the awarded contractor/vendor is claiming minority status, the contractor/vendor shall apply for certification by Chatham County, Georgia to the Office of Minority Business Coordinator. The Minority Business Coordinator will provide documentation of application status once approved or disapproved by Chatham County. Certification by any other government entity is acceptable if current copy of the certification is provided with this solicitation. For additional information concerning Chatham County's M/WBE Coordinator, please contact Connell Heyward, at (912) 652-7860 or cheyward@chathamcounty.org.

The undersigned proposer certifies that he/she has carefully read the preceding list of instructions and all other data applicable hereto and made a part of this invitation; and, further certifies that the prices shown in his/her proposal are in accordance with all documents contained in this Request for Proposals package, and that any exception taken thereto may disqualify his/her proposal.

This is to certify that I, the undersigned Proposer, have read the instructions to Proposer and agree to be bound by the provisions of the same.

This _____ day of _____, 20__.

BY

SIGNATURE

DATE

COMPANY

TITLE

TELEPHONE NUMBER

REQUEST FOR PROPOSALS

GENERAL CONDITIONS SECTION III

DESCRIPTION AND OBJECTIVES: Chatham County is seeking a qualified insurance agent/broker to present specifications and/or coverage requests to insurance carriers for quotations on various portions of the County's commercial insurance program.

- 3.1 METHODOLOGY:** The procurement described herein may be conducted in a two-step process.

STEP 1 - ACCEPTANCE AND EVALUATION OF PROPOSALS: All technical requirements, unless otherwise specified, must be met by the proponent or such proposal will be disqualified as being non-responsive. Proposals that are deemed to be incomplete as to substance and content may be returned without consideration. Proponents whose proposals are not accepted will be promptly notified that they are no longer being considered and why. A shortlist of qualified firms will be developed and ranked.

Fee proposals shall be submitted along with the proposal and will be evaluated and ranked accordingly. Fee proposal should be quoted in "all inclusive" dollars. The evaluation committee will make the selection of the firm which it believes is best qualified to provide the service, fee proposal and other qualitative factors considered. It is emphasized that the firm which offers the lowest fee proposal will not necessarily be the firm selected. The selection will be made of that firm which provided the best proposal. "Best" is defined as the best combination of qualitative factors and price proposal.

STEP 2 – INTERVIEWS/PRESENTATION: The evaluation committee **may** request an interview with each finalist firm. If interviews are conducted, they will be scored. It will be at the discretion of the evaluation committee on the number of firms that will interview/present.

- 3.2 PRE-PROPOSAL CONFERENCE:** A pre-proposal conference will be held at **2:00 P.M., on July 28, 2015, at the Chatham County Purchasing & Contracting Department, 1117 Eisenhower Drive, Suite C, Savannah, Georgia.** Representatives from Chatham County will be in attendance. Attendance assures that all competitors hear the same information, can ask questions and suggest constructive changes to the solicitation.

- 3.3 PROPOSAL DEADLINE:** The response to this 'Request for Proposal' must be received by the Purchasing Division no later than **5:00 P.M., AUGUST 11, 2015.** Any proposal received after the time stipulated will be rejected and returned unopened to the proponent.

For good and sufficient reason, up to 24 hours before the advertised deadline, the County may extend the response schedule. Should such action occur, all proponents who attended the pre-proposal conference will receive an addendum setting forth the new date and time.

It is emphasized that late proposals will be rejected.

- 3.4 WITHDRAWAL OF PROPOSAL:** Any proposal submitted before the deadline may be withdrawn by written request received by the County before the time fixed for receipt of proposals. Withdrawal of any proposal will not prejudice the right of a proponent to submit a new or amended proposal as long as Chatham County receives it by the deadline as provided herein.
- 3.5 CONFIDENTIALITY OF DOCUMENTS:** Upon receipt of a proposal by the County, the proposal shall become the property of the County without compensation to the proponent, for disposition or usage by the County at its discretion (except for as provided by Georgia law for proprietary information). The details of the proposal documents will remain confidential until final award or rejection of proposals and/or protected under the restraints of law. Only final points and ranking of proposals will be openly disclosed prior to approval by the Board of Commissioners. Proponent shall have no contact with any Department Representative or Evaluation Committee Member during and after the evaluation process. Any information contained in the proposal that is considered by the Proponent as “proprietary” to remain confidential shall be clearly identified and justified.
- 3.6 CONE OF SILENCE:** Lobbying of Procurement Evaluation Committee members, County Government employees, and elected officials regarding this product or service solicitation, Invitation to Bid (ITB) or Request for Proposal (RFP) or contract by any member of a proposer’s staff, or those people employed by any legal entity affiliated with an organization that is responding to the solicitation is strictly prohibited. Negative campaigning through the mass media about the current service delivery is strictly prohibited. Such actions may cause your proposal to be rejected.
- 3.7 FORMAT OF RESPONSES:** To be considered, proponents must submit a complete response to the Request for Proposal. The format provided in this Section is not negotiable. To assure a uniform review process and obtain the maximum degree of comparability, each proposal shall include the following content and shall be presented in the following order:
- A. Introduction/Cover Letter
 - B. Qualifications and Experience
 - C. Methodology/Implementation Plan
 - D. M/WBE Participation
 - E. Fee Proposal - Submit using Fee Proposal Form
 - F. References
 - G. Other Relevant Facts/Information
 - H. Attachments

Each proposal must be submitted in one (1) original and five (5) copies bound to:

Ms. Robin L. Maurer, Asst. Purchasing Director

Chatham County Purchasing Department
1117 Eisenhower Drive - Suite C
Savannah, GA 31406
(912) 790-1623

- 3.8 COMPENSATION:** The County has attempted in SECTION V to provide as much information about the project as possible to enable firms to structure their offer.
- 3.9 REJECTING PROPOSALS:** The County reserves the right to reject any or all proposals and is not bound to accept any proposal if that proposal is contrary to the best interest of Chatham County. Similarly, the County is not bound to accept the lowest dollar proposal if the offer is not considered in the County's best interest.
- 3.10 COST TO PREPARE RESPONSES:** The County assumes no responsibility or obligation to the respondents and will make no payment for any costs associated with the preparation or submission of the proposal.
- 3.11 INQUIRIES:** Direct any questions related to this RFP to Ms. Robin Maurer, Asst. Purchasing Director, and submit all questions in writing. Include the RFP number, page, and paragraph number as a reference to each question. If you choose to mail your questions, do not place the RFP number on the outside of the envelope. DEADLINE FOR ALL QUESTIONS IS one week prior to due date. All questions shall be delivered by hand, mail, fax or e-mailed as follows:

Chatham County Purchasing and Contracting Division
Attn: Robin Maurer, Asst. Purchasing Director
1117 Eisenhower Drive, Suite C
Savannah, GA 31406
(912) 790-1627 (FAX)
rlmaurer@chathamcounty.org

THE ONLY OFFICIAL ANSWER OR POSITION OF CHATHAM COUNTY WILL BE THE ONE STATED IN WRITING.

- 3.12 METHOD OF SOURCE SELECTION:** Chatham County is using the Competitive Sealed Proposal method of source selection, as authorized by Section V of the Chatham County Purchasing Ordinance and Article VI of the Purchasing Procedures Manual for this procurement.

An award, if made, will be made to the responsible offeror whose proposal is most advantageous to Chatham County, taking into consideration price and other factors set forth in this Request for Proposal (RFP). The County will not use any other factors or criteria in the evaluation of the proposals received.

- 3.13 EQUAL EMPLOYMENT OPPORTUNITY:** During the performance of this contract, the COMPANY agrees as follows:

The COMPANY will not discriminate against any employee or applicant for employment because of race, creed, color, sex, age, national origin, place of birth, physical handicap, or marital status.

SECTION IV SPECIAL CONDITIONS

- 4.1 PENDING LITIGATION:** Proposals will not be accepted from any company, firm, person, or party, parent subsidiary, against which Chatham County has an outstanding claim, or a financial dispute relating to prior contract performance. If the County, at any time, discovers such a dispute during any point of evaluation, the proposal will not be considered further.
- 4.2 EVALUATION FACTORS:** Factors such as proponents overall capability, specialized experience, reputation, past performance on similar projects, technical competence, financial stability, ability to meet program goals, delivery under the contract terms, and fee schedule will be considered in the award recommendation. Commitment in the level of MBE/WBE firms, consultants and employees will also be considered in the evaluation of proposals.
- 4.3 SELECTION PROCESS:** *Proposals will be evaluated initially on the basis of the written document. Thus, the proposal must be complete, concise and clear as to the intent of the respondent.* Further evaluation may include an oral presentation will be scheduled after receipt of the written proposal and approval of the shortlist.
- 4.4** The term of the contract will be for one (1) year with renewal options for four (4) additional one (1) year terms.
- 4.5 PROPOSALS MUST BE RESPONSIVE TO:**
- 4.5.1 INTRODUCTION/COVER LETTER (SECTION A):** You should provide no more than a two (2) page letter of introduction. The letter should highlight or summarize whatever information you deem appropriate as a cover letter, as a minimum, this section should include the name, address, telephone number and fax number of one (1) contact to whom any correspondence should be directed. This section should include a clear statement of the Proposer's understanding of this RFP and the contract requirements, and how the Proposer intends to meet the RFP requirements.
- 4.5.2 QUALIFICATIONS AND EXPERIENCE - TOTAL POSSIBLE POINTS: 25 (SECTION B):**
- A. The name, title, address, and telephone number of the person (s) who will be assigned to perform service under the proposal.
 - B. Resumes/credentials of the person(s) who will perform the services required and state how long they have been with your firm. For each key

staff person that will participate in the program, attach a resume. Highlight key and relevant experience. Credentials may be subject to verification.

- C. Adequate information to describe the scope of the offeror's previous experience in providing Insurance Agent/Broker Services.
- D. List of current or former clients with requirements similar in scope and content to the proposed contract, a contact and current telephone number at each client location. Chatham County reserves the right to verify the information furnished.
- E. Adequate information to describe the nature of the offeror's experience in providing Insurance Agent/Broker Services.
- F. State if your firm has operated under a different name within the past 10 years and provide that name that your firm previously operated under.
- G. Provide complete details of any contract that your firm has been fired during the last five (5) years.
- H. State qualification of the firm with emphasis on quality control. State the experience of the firm in administrating self-funded, government plans similar in size to Chatham County.

4.5.3 METHODOLOGY/IMPLEMENTATION PLAN - TOTAL POSSIBLE POINTS: 30 (SECTION C): Discuss the approach to rendering the required services. Any special techniques, strategies and capabilities should be discussed here. A detailed narrative statement to demonstrate the offerors' understanding of the Scope of Work described below. The statement shall include but not necessarily be limited to the offerors' proposed organizational structure and procedures to provide the required services, software and equipment to be used, expectations regarding the County's responsibilities and contributions under the contract, any limitations in delivering all the required services, any potential problem areas that might impede the successful implementation of the contract, and any other information not specifically required elsewhere in this RFP but considered pertinent by the offeror. State additional information regarding your services that distinguishes your firm from your competition.

4.5.4 MWBE PARTICIPATION - TOTAL POSSIBLE POINTS: 15 (SECTION D): Commitment in the level of local MWBE firms, subcontractors, consultants and employees. Approach to meeting and exceeding the MWBE requirements. History of Minority-owned, Women-owned business utilization.

4.5.5 FEE PROPOSAL - TOTAL POSSIBLE POINTS: 25 (SECTION E): All fees will be based on an annual fixed fee. Chatham County recognizes that flood insurance cannot be written net of commission. Proponent will consider flood

insurance commissions received when preparing fee proposal. Fees provided must be all inclusive and cover any item which may normally be regarded as reimbursable.

4.5.6 REFERENCES – TOTAL POSSIBLE POINTS: 5 (SECTION F): Provide a minimum of five (5) references with emphasis on governments. References must be similar in size and scope. Please include contact person, address, and best method of contact.

4.5.7 INTERVIEWS/PRESENTATIONS (IF REQUIRED) – TOTAL POSSIBLE POINTS: 30

4.6 CONTRACT: The successful respondent will be expected to execute a contract within 30 days of notice of award.

4.7 ASSIGNMENT: The PROPOSER shall not assign or transfer any interest of the contract without prior written consent of the County.

SECTION V TECHNICAL SPECIFICATIONS

5.1 BACKGROUND AND OBJECTIVES: Chatham County was incorporated in 1777 and is governed by nine (9) Commissioners including one (1) Chairman. The County encompasses 438 square miles and has a population of 251,120 citizens.

The County entered into an agreement with the City of Savannah for police services – all police officers are employees of the City of Savannah. The County employs no firefighters. Chatham County Health Department is a department of the State of Georgia, however, the County insures Health Department's facilities. The County is also responsible for insuring the buildings and contents of the Live Oak libraries located in Chatham County. Live Oak Public Library employees employed within Chatham County are covered under the County's self-funded Workers' Compensation Program.

The County currently has approximately 1,700 full, part-time and seasonal employees. Building and Contents insurance comprise the majority of the total commercial insurance budget, with the County retaining exposures related to Workers' Compensation (except Excess), general, auto and public official's liability.

5.2 CHATHAM COUNTY INTERNAL PROCEDURES:

The County currently contracts with USI Insurance Services for insurance agent/broker services. It is the intent to award a contract to one (1) qualified broker. However, the County reserves the right to award all or part of the services requested to one (1) or more brokers if deemed to be in the best interest of the County.

Chatham County relies on the doctrines of public and official immunity as its primary

claims defense. Each claim is evaluated on a case-by-case basis and the County asserts any and all defenses permitted by law.

The immunity defense does not apply to the use of licensed vehicles. The County retains the liability and physical damage exposure related to vehicles and adjusts these claims in-house. Adjudication responsibility is shared between the Risk Manager and the County Attorney.

Designated property (building, contents and computers) are subject to annual insurance appraisals. A summary of commercial insurance follows:

Buildings and Personal Property:

Renewal Date: December 1. The property program consists of three (3) carriers:

- A. Cincinnati – TIV: 175,975,616 (120% margin clause)
Boiler & Machinery-5,000,000
Extra Expense - \$ 5 M
Deductible: 3% TIV 100,000 min., - \$2 million max.
(Named Storm) (Detention Center and Judicial Courthouse)
- B. Cincinnati – TIV: \$57,573,292
Business Income and/or Extra Expense - \$5.150M
Deductible: 2% TIV \$100,000 min - \$2M max. (Named storm)
120% Margin Clause (Libraries Located Within Chatham County)
- C. Cincinnati – TIV: \$152,806,914 (Blanket = \$117,149,263, ACV = 7,384,172) Business Income and/or Extra Expense - \$5.150M
Deductible: 2% TIV \$100,000 min. - \$3 M max. (Named storm)
20% Margin Clause
(All Other Locations)
- D. Hartford – EDP: \$15,683,000 M
Flood Zone A & B Sublimit:
\$500,000 Deductible: 5% -
\$25,000 min.
(All Locations)
- E. Arch Specialty – TIV: \$2.9M – Tybee Island Property (Pavilion, Tybee Library, and Communications Equipment)
\$5,000 per Occurrence, except Windstorm – 3% of TIV - \$50,000 min.

The County has contracted with Adjusters International to coordinate insurance and FEMA Claims Management.

Aviation Liability & Hull: Renewal Date: July 11. Chatham County Mosquito Control department owns and operates four (4) aircraft – two fixed wing and two

helicopters. Primary function of all aircraft is mosquito abatement in Chatham County, however, helicopters are also used for police activities, fire suppression, emergency management, and out-of-County transportation.

ACE/Westchester - \$1M/occurrence aircraft liability and \$300,000/occurrence/ \$1M Aggregate for chemical liability. 10% [Hull Premium] no claims annual bonus.

<u>Aircraft:</u>	<u>Registration</u>	<u>Insured Values</u>	<u>Deductible</u>	
			<u>Not in Motion</u>	<u>In Motion</u>
1988 MD-500	N102CQ	\$500,000	\$250	\$7,500
1987 MD-500	N241JH	500,000	250	\$8,625
1994 Air Tractor	N60057	350,000	250	\$5,000
1992 MD-500	N437CB	575,000	250	\$7,500

Workers' Compensation Excess: Renewal Date: July 1.

Carrier: Safety National

Limits: Statutory Workers' Compensation \$1 M Employers Liability

Sublimit - Aircraft: \$5 M Policy Limit/ \$1M per Life

Payroll: \$67 M

Retention: \$750,000/accident

Endorsement: Voluntary Compensation, Limited USL&H/Jones Act Aircraft

Excess Workers' Compensation insurance will be placed by the broker of record.

Fiduciary Liability: Renewal Date: September 18.

Carrier: Travelers

Limits: \$2 million annual aggregate (includes defense costs)

Insured: Chatham County Employees Retirement Plan (non-ERISA)

Plan: Chatham County Section 115 OPEB Trust, Director, Officer, Trustee Chatham County Employee Benefit

Deductible (Per claim): \$10,000

Flood Insurance: Chatham County participates in National Flood Insurance [Regular] Program (NFIP) and purchases coverage for those locations identified for mandatory coverage up to the value of the building and contents or to the maximum limit available under NFIP. See attachment schedule of locations and coverage.

Public Employees Blanket Bond and Individual/Position Bonds: Attached is a schedule of the Public Employees Blanket Bonds including bond amounts per position

and expiration. At expiration the County is interested in combining all position bonds into blanket bonds where possible. Chatham County currently has approximately 1700 employees/eligible participants.

5.3 GENERAL QUALIFICATIONS (To be addressed as a part of Section 4.5.2)

5.3.1 Proposals will not be considered from any firm that does not meet the following minimum qualifications:

5.3.2 Broker must be licensed to conduct business in the State of Georgia.

5.3.3 Broker must have access to Excess and Surplus Lines carriers. Please state how your firm gains access to the E&S market – i.e. preferred carrier(s) by line.

5.3.4 Broker must have a minimum of five (5) years' experience in structuring government insurance programs – preferably Georgia governments.

5.3.5 Broker must have a minimum of two (2) qualified principals or a combination of principal and customer service representative, each with a minimum of five (5) years government insurance program experience. RESUMES OUTLINING EXPERIENCE AND QUALIFICATION OF EACH PERSON ASSIGNED TO CHATHAM COUNTY MUST BE INCLUDED IN THE PROPOSAL.

5.4 SCOPE OF SERVICES: In addition to the objectives outlined in the background section of this proposal, we are requesting your firm to address its capabilities and ability to comply with the following questions and statements:

5.5 QUALIFICATIONS: (To be addressed as a part of Section 4.5.2)

5.5.1 Obtain quotes from insurance carriers and negotiate best terms and conditions for all commercial accounts. All quotes are to be presented in writing to the Risk Manager. Declinations should also be in writing and presented to the Risk Manager

5.5.2 Broker will continue coverage through existing carriers unless alternatives are proven more effective and/or cost beneficial.

5.5.3 Explain the intent behind application of a 'margin clause' on a Building and Personal Property policy including blanket coverage with an agreed amount endorsement. What coinsurance percentage is applicable; how the margin clause is applied after a loss; how the margin clause may limit recovery; and how the insured can maximize coverage.

5.5.4 On May 29, 2008, the Federal Emergency Management Agency (FEMA) issued Fact Sheet DAP9580.3, Insurance Considerations for Applicants. Please provide an overview of the important elements of Fact Sheet DAP9580.3 as it relates to the Public Assistance (PA) Program. In addition, please briefly discuss how the

elements contained in Fact Sheet DAP9580.3 would affect how your firm would design the components of a commercially insured building and contents property insurance program [government entity] on a pre-disaster and post-disaster basis. Your response should be guided by the three key provisions of the Robert T. Stafford Disaster Relief and Emergency Assistance Act (Stafford Act), 42 USC.5121-5206, as amended, and 44 Code of Federal Regulations (CFR) §§206.250,206.252, and 206.253.

5.5.5 Discuss your firm's experience in designing and managing an Owner/Contractor Controlled Insurance Program. Explain the advantages and disadvantages of such a program and how a project is evaluated to determine if implementation is feasible. If the County determines an Owner/Contractor Controlled Insurance Program is beneficial, the design, implementation, and administration will be considered outside the scope of any contract arising from this RFP.

5.6 REPORTING REQUIREMENTS: (To be addressed as a part of Section 4.5.3)

- 5.6.1 Broker shall prepare an annual marketing strategy for all coverage including identifying current or expected market conditions.
- 5.6.2 At renewal of each line of coverage, identify (in writing) which markets were contacted; which markets provided quotes; which markets declined to quote; and reason(s) for declining. Chatham County requires all quotations and or proposals be submitted to the Risk Manager no later than 15 days prior to the effective date of coverage.
- 5.6.3 Prepare an annual summary report including a schedule of policies in force, coverage provisions, premiums, and prior year claims experience and recommendations for possible adjustments to coverage for the next policy year. The summary report shall also provide a summary of broker support services rendered during the prior year, with recommendations for broker services for the subsequent year.
- 5.6.4 Provide a contact person(s) for response to day-to-day insurance claim questions and provide other services normally and customarily required of a broker.
- 5.6.5 Meet periodically with the Risk Manager to discuss loss control issues, exposure changes, and general administrative matters and monitor the viability and cost effectiveness of the County's entire insurance and risk management program(s).

5.7 FINANCIAL MANAGEMENT: (To be answered as a part of Section 4.5.3)

- 5.7.1 Broker services will be invoiced quarterly.

- 5.7.2 Discuss your firm’s philosophy with regard to contingent commissions.
- 5.7.3 Broker services are to be provided on a “net of commission” or fixed fee” basis. Chatham County recognizes flood insurance cannot be written net of commission. Flood insurance commissions will be considered in addition to the annual “fixed fee.” The selected broker is required to disclose commission percentage.
- 5.7.4 Describe how would you service existing insurance policies including, but not limited to, adequacy of coverage; develop options to address any coverage deficiencies; process policy changes; update applications; answer questions; trend property values; evaluate the financial stability of current and prospective insurers; and issue certificates of insurance.
- 5.7.5 Describe how you would assist the County in developing insurance requirements for various vendor contracts (i.e. design, construction, service) and review insurance policies, certificates of insurance, contracts, leases, and bonds as requested by the County.

5.8 LOSS CONTROL AND CLAIMS AUDITING SERVICES: (To be answered as a part of Section 4.5.3)

- 5.8.1 Briefly describe your experience providing loss control services to public entities. Include the name(s) and qualifications of the personnel that provide this service.
- 5.8.2 Briefly describe your experience providing claims auditing services to public entities. Include the name(s) and qualifications of the personnel that provide this service.

5.9 REFERENCES:

Please provide at least five (5) current or past government clients for who you furnish(ed) government Insurance Broker services. Please provide the client’s name, address, phone number and the name of a contact person. Chatham County is interested in the type of service(s) provided and how long that reference has been your client.

**SECTION VI
EVALUATION AND AWARD
INSURANCE BROKER SERVICES**

6.1 EVALUATION: Each response to this RFP shall be subject to the same review and assessment process. Proposals will be evaluated and ranked on the basis of points awarded by a technical review panel. A description of the factors which will be analyzed, and the relative weight accorded each factor follows. *The County will not consider the proposal of any Offeror who lacks accreditation or authorization to provide the Consultant Services requested.*

STEP 1: PROPOSAL SUBMITTAL (*TOTAL POSSIBLE POINTS: 100*).

<i>Evaluating Factor:</i>	<i>Points Possible:</i>
<i>Qualifications and Experience</i>	25
<i>Methodology/Implementation Plan</i>	30
<i>M/WBE Participation</i>	15
<i>Fee Proposal</i>	25
<i>References</i>	5

STEP 2- INTERVIEWS/PRESENTATIONS- IF REQUIRED (*TOTAL POSSIBLE POINTS: 30*)

6.2 CONTRACT AWARD:

- 6.2.1 Successful Proponent will be asked to submit his/her firms' contractual issues for consideration in the Chatham County contract. Proposals will become part of the contract.
- 6.2.2 No work shall be performed under the contract until a contract has been fully executed by both parties. A notice to proceed will be issued by Chatham County.

**REQUEST FOR PROPOSAL
RFP NO. 15-0063-7
INSURANCE AGENT/BROKER SERVICES
CHATHAM COUNTY, GEORGIA**

FEE PROPOSAL FORM

FEE TO BE BASED ON LUMP SUM COST PER YEAR:

Year 1: 2015/2016 _____ /Total

Year 2: 2016/2017 _____ /Total

Year 3: 2017/2018 _____ /Total

Year 4: 2018/2019 _____ /Total

Year 5: 2019/2020 _____ /Total

FIRM NAME: _____

PROPOSER: _____

SIGNATURE: _____

ADDRESS: _____

CITY/STATE/ZIP: _____

TELEPHONE: _____

FAX NUMBER: _____

E-MAIL: _____

ATTACHMENT A

DRUG - FREE WORKPLACE CERTIFICATION

THE UNDERSIGNED CERTIFIES THAT THE PROVISIONS OF CODE SECTIONS 50-24-1 THROUGH 50-24-6 OF THE OFFICIAL CODE TO GEORGIA ANNOTATED, RELATED TO THE ****DRUG-FREE WORKPLACE****, HAVE BEEN COMPLIED WITH IN FULL. THE UNDERSIGNED FURTHER CERTIFIES THAT:

1. A Drug-Free Workplace will be provided for the employees during the performance of the contract; and
2. Each sub-contractor under the direction of the Contractor shall secure the following written certification:

_____ (CONTRACTOR)
certifies to Chatham County that a Drug-Free Workplace will be provided for the employees during the performance of this contract known as **INSURANCE AGENT /BROKER SERVICES** (PROJECT) pursuant to paragraph (7) of subsection (B) of Code Section 50-24-3. Also, the undersigned further certifies that he/she will not engage in the unlawful manufacture, sale, distribution, possession, or use of a controlled substance or marijuana during the performance of the contract.

CONTRACTOR

DATE

NOTARY

DATE

ATTACHMENT B

PROMISE OF NON-DISCRIMINATION STATEMENT

Know All Men By These Presence, that I (We), _____
Name

_____, _____
Title Name of Bidder

(herein after Company) in consideration of the privilege to bid/or propose on the following Chatham **County project for INSURANCE AGENT/BROKER SERVICES** hereby consent, covenant and agree as follows:

- (1) No person shall be excluded from participation in, denied the benefit of or otherwise discriminated against on the basis of race, color, national origin or gender in connection with the bid submitted to Chatham County or the performance of the contract resulting therefrom;
- (2) That it is and shall be the policy of this Company to provide equal opportunity to all business persons seeking to contract or otherwise interested with the Company, including those companies owned and controlled by racial minorities, and women;
- (3) In connection herewith, I (We) acknowledge and warrant that this Company has been made aware of, understands and agrees to take affirmative action to provide minority and women owned companies with the maximum practicable opportunities to do business with this Company on this contract;
- (4) That the promises of non-discrimination as made and set forth herein shall be continuing throughout the duration of this contract with Chatham County;
- (5) That the promises of non-discrimination as made and set forth herein shall be and are hereby deemed to be made a part of and incorporated by reference in the contract which this Company may be awarded;
- (6) That the failure of this Company to satisfactorily discharge any of the promises of non-discrimination as made and set forth above may constitute a material breach of contract entitling the County to declare the contract in default and to exercise appropriate remedies including but not limited to termination of the contract.

Signature

Date

B-1

**ATTACHMENT C
DISCLOSURE OF RESPONSIBILITY STATEMENT**

Failure to complete and return this information will result in your bid/offer/proposal being disqualified from further competition as non-responsive.

1. List any convictions of any person, subsidiary, or affiliate of the company, arising out of obtaining, or attempting to obtain a public or private contract or subcontract, or in the performance of such contract or subcontract.

2. List any indictments or convictions of any person, subsidiary, or affiliate of this company for offenses such as embezzlement, theft, fraudulent schemes, etc. or any other offenses indicating a lack of business integrity or business honesty which affects the responsibility of the contractor.

3. List any convictions or civil judgments under states or federal antitrust statutes.

4. List any violations of contract provisions such as knowingly (without good cause) to perform, or unsatisfactory performance, in accordance with the specifications of a contract.

5. List any prior suspensions or debarments by any governmental agency.

6. List any contracts not completed on time.

7. List any penalties imposed for time delays and/or quality of materials and workmanship.

8. List any documented violations of federal or any state labor laws, regulations, or standards, occupational safety and health rules.

C-1

I, _____, as _____
Name of individual Title & Authority

of _____, declare under oath that

Company Name _____

the above statements, including any supplemental responses attached hereto, are true.

Signature

State of _____

County of _____

Subscribed and sworn to before me on this _____ day of _____

20__ by _____ representing him/herself to be

_____ of the company named herein.

Notary Public

My Commission expires:

Resident State: _____

C-2
ATTACHMENT D

CONTRACTOR AFFIDAVIT under O.C.G.A. § 13-10-91(b)(1)

By executing this affidavit, the undersigned contractor verifies its compliance with O.C.G.A. § 13-10-91, stating affirmatively that the individual, firm or corporation which is engaged in the physical performance of services on behalf of CHATHAM COUNTY has registered with, is authorized to use and uses the federal work authorization program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicable provisions and deadlines established in O.C.G.A. § 13-10-91. Furthermore, the undersigned contractor will continue to use the federal work authorization program throughout the contract period and the undersigned contractor will contract for the physical performance of services in satisfaction of such contract only with subcontractors who present an affidavit to the contractor with the information required by O.C.G.A. § 13-10-91(b). Contractor hereby attests that its federal work authorization user identification number and date of authorization are as follows:

Federal Work Authorization User Identification Number

Date of Authorization

Name of Contractor

Name of Project

Name of Public Employer

I hereby declare under penalty of perjury that the foregoing is true and correct.

Executed on _____, ____, 20__ in _____(city), _____(state).

Signature of Authorized Officer or Agent

Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME
ON THIS THE _____ DAY OF _____, 20__.

NOTARY PUBLIC

My Commission Expires:

D-1

SUBCONTRACTOR AFFIDAVIT under O.C.G.A. § 13-10-91(b)(3)

By executing this affidavit, the undersigned subcontractor verifies its compliance with O.C.G.A. 13-10-91, stating affirmatively that the individual, firm or corporation which is engaged in the physical performance of services under a contract with _____ (name of contractor) on behalf of CHATHAM COUNTY has registered with, is authorized to use and uses the federal work authorization program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicable provisions and deadlines established in O.C.G.A. § 13-10-91. Furthermore, the undersigned subcontractor will continue to use the federal work authorization program throughout the contract period and the undersigned subcontractor will contract for the physical performance of services in satisfaction of such contract only with sub-subcontractors who present an affidavit to the subcontractor with the information required by O.C.G.A. § 13-10-91 (b). Additionally, the undersigned subcontractor will forward notice of the receipt of an affidavit from a sub-subcontractor to the contractor within five (5) business days of receipt. If the undersigned subcontractor receives notice of receipt of an affidavit from any sub-subcontractor that has contracted with a sub-subcontractor to forward, within five (5) business days of receipt, a copy of such notice to the contractor. Subcontractor hereby attests that its federal work authorization user identification number and date of authorization are as follows:

Federal Work Authorization User Identification Number

Date of Authorization

Name of Subcontractor

Name of Project

Name of Public Employer

I hereby declare under penalty of perjury that the foregoing is true and correct.

Executed on _____, ____, 20__ in _____(city), _____(state).

Signature of Authorized Officer or Agent

Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME

ON THIS THE _____ DAY OF _____, 20__.

NOTARY PUBLIC

My Commission Expires:

D-2
ATTACHMENT E

**BIDDER’S CERTIFICATION REGARDING DEBARMENT, SUSPENSION,
INELIGIBILITY AND VOLUNTARY EXCLUSION**

The undersigned certifies, by submission of this proposal or acceptance of this contract, that neither Contractor nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntary excluded from participation in this transaction by any Federal department or agency, State of Georgia, City of Savannah, Board of Education of local municipality. Bidder agrees that by submitting this proposal that Bidder will include this clause without modification in all lower tier transactions, solicitations, proposals, contracts, and subcontracts. Where the Bidder or any lower tier participant is unable to certify to this statement, that participant shall attach an explanation to this document.

Certification - the above information is true and complete to the best of my knowledge and belief.

(Printed or typed Name of Signatory)

(Signature)

(Date)

NOTE: The penalty for making false statements in offers is prescribed in 18 U.S.C. 1001

END OF DOCUMENT Mod. CC P & C 6/2005

ATTACHMENT F

**Chatham County
Minority and Women Business Enterprise Program
M/WBE Participation Report**

Name of Bidder: _____

Name of Project: _____

Bid No: _____

M/WBE Firm	Type of Work	Contact Person/ Phone #	City, State	%	MBE or WBE

MBE Total _____

WBE Total _____%

M/WBE Combined _____%

The undersigned should enter into a formal agreement with M/WBE Contractor identified herein for work listed in this schedule conditioned upon execution of contract with the Chatham County Board of Commissioners.

Signature _____ Print _____

Phone () _____

Fax () _____

F-1

ATTACHMENT G

***Systematic Alien Verification for Entitlements (SAVE)
Affidavit Verifying Status for Chatham County Benefit Application***

By executing this affidavit under oath, as an applicant for a Chatham County, Georgia Business License or Occupation Tax Certificate, Alcohol License, Taxi Permit, Contract or other public benefit as reference in O.C.G.A. Section 50-36-1, I am stating the following with respect to my bid for a Chatham County contract for _____. [Name of natural person applying on behalf of individual, business, corporation, partnership, or other private entity]

1.) _____ I am a citizen of the United States.

OR

2.) _____ I am a legal permanent resident 18 years of age or older.

OR

3.) _____ I am an otherwise qualified alien (8 § USC 1641) or non-immigrant under the Federal Immigration and Nationality Act (8 USC 1101 et seq.) 18 years of age or older and lawfully present in the United States.*

In making the above representation under oath, I understand that any person who knowingly and willfully makes a false, fictitious, or fraudulent statement or representation in an affidavit shall be guilty of a violation of Code Section 16-10-20 of the Official Code of Georgia.

Signature of Applicant: _____ Date _____

Printed Name: _____

SUBSCRIBED AND SWORN
BEFORE ME ON THIS THE
____ DAY OF _____, 20____

* _____
Alien Registration number for non-citizens.

Notary Public

My Commission Expires:

G-1

**ATTACHMENT H
AFFIDAVIT REGARDING LOBBYING**

Each Bidder/Proposer and all proposed team members and subcontractors must sign this affidavit and the Bidder /Proposer shall submit the affidavits with their proposal confirming that there has been no contact with public officials or management staff for the purpose of influencing award of the contract. Furthermore, each individual certifies that there will be no contact with any public official prior to contract award for the purpose of influencing contract award.

The undersigned further certifies that no team member or individual has been hired or placed on the team in order to influence award of the contract. All team members are performing a commercially useful function on the project.

Failure to provide signed affidavits from all team members with your response may be cause to consider your bid/proposal non-responsive.

BY: Authorized Officer or Agent

Date

Title of Authorized Officer or Agent

Printed Name of Authorized Officer or Agent

SUBSCRIBED AND SWORN
BEFORE ME ON THIS THE
____ DAY OF _____, 20____

Notary Public
My Commission Expires:

My Commission expires:

Resident State: _____

H-1

LEGAL NOTICE

CC NO. 166198

REQUEST FOR PROPOSALS

Sealed proposals will be received until **5:00 P.M. on AUGUST 11, 2015** in **Chatham County Purchasing and Contracting Department, 1117 EISENHOWER DRIVE, SUITE C, SAVANNAH, GA. RFP NO. 15-0063-7 INSURANCE AGENT/BROKER SERVICES.**

A PRE-PROPOSAL CONFERENCE will be held at **2:00 P.M., on JULY 28, 2015, AT THE CHATHAM COUNTY PURCHASING AND CONTRACTING DEPARTMENT, 1117 EISENHOWER DRIVE, SUITE C, SAVANNAH, GEORGIA.** You are encouraged to attend.

Invitation to Submit Proposal Packages are available at 1117 Eisenhower Drive, Suite C, Savannah, Georgia, and on the Chatham County Purchasing Web Site <http://purchasing.chathamcounty.org>, or by calling Robin Maurer, Asst. Purchasing Director, at (912) 790-1623. All firms requesting to do business with Chatham County must also register on-line at <http://purchasing.chathamcounty.org>

CHATHAM COUNTY RESERVES THE RIGHT TO REJECT ANY/AND OR ALL PROPOSALS AND TO WAIVE ALL FORMALITIES. THIS WILL BE THE ONLY SOLICITATION FOR THIS PROJECT. ONLY THOSE FIRMS RESPONDING TO THE RFP WILL BE ALLOWED TO PARTICIPATE IN THE PROJECT.

"CHATHAM COUNTY IS AN EQUAL OPPORTUNITY EMPLOYER, M/F/H, ALL PROPOSERS ARE TO BE EQUAL OPPORTUNITY EMPLOYERS"

MARGARET H. JOYNER, PURCHASING DIRECTOR

SAVANNAH N/P INSERT: July 9, 2015

