

INVITATION TO SUBMIT

P R O P O S A L

**REQUEST FOR PROPOSALS - RFP NO.: 19-0019-7**

**ANNUAL CONTRACT FOR BENEFITS CONSULTING AND ACTUARIAL SERVICES  
FOR CHATHAM COUNTY**

**PRE-PROPOSAL CONFERENCE: 2:00 P.M., FEBRUARY 28, 2019**

**PROPOSALS RECEIVED BY: 5:00 P.M., MARCH 14, 2019**

THE COMMISSIONERS OF CHATHAM COUNTY, GEORGIA

ALBERT J. SCOTT, CHAIRMAN

COMMISSIONER HELEN J. STONE

COMMISSIONER TABITHA ODELL

COMMISSIONER JAMES J. HOLMES

COMMISSIONER JAMES "JAY" JONES

COMMISSIONER BOBBY LOCKETT

COMMISSIONER DEAN KICKLIGHTER

COMMISSIONER PATRICK J. FARRELL

COMMISSIONER CHESTER A. ELLIS

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: February 12, 2019**

**RFP NO.: 19-0019-7**

**GENERAL INFORMATION FOR REQUEST FOR PROPOSALS**

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., March 14, 2019**. 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., February 28, 2019** and be held at the **Administrative/Legislative Courthouse, 124 Bull Street, 3<sup>rd</sup> Floor Conference Room, 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.

**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.
- B. 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 **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.
- 1.6 **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.
- 1.7 **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.
- 1.8 **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.
- 1.9 **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.
- 1.10 **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."
- 1.11 **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. It is the proposer's responsibility to

inform the County should the proposer/firm be placed on the Federal or State of Georgia Excluded Parties Listing during the proposal process. 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. Successful proposers with whom the County enters into a contract with for goods or services will notify the County if they become debarred during the course of the contract.

\*\* 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.

- 1.12 **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, at 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 Ordinance – Part 9 – Vendor Disputes 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.

Minimum Limits: \$1 million per claim/occurrence.

Coverage Requirement: 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 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](mailto: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

### SPECIFIC CONDITIONS SECTION III

**3.1 DESCRIPTION AND OBJECTIVES:** Chatham County is seeking qualified firms interested in providing employee benefit consulting and actuarial services. It is the County's intent to award an annual contract as a result of this solicitation.

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

#### **STEP ONE- ACCEPTANCE AND EVALUATION OF QUALIFICATION**

**PROPOSALS:** All technical requirements, unless otherwise specified, must be met by the proponent or such proposal may be disqualified as being non-responsive. Proposals that are deemed to be incomplete as to substance and content may be returned without consideration. A shortlist of qualified firms will be developed and ranked.

**STEP TWO-INTERVIEWS:** The evaluation committee **may** request an interview with short-listed firms. 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.

**3.3 PRE-PROPOSAL CONFERENCE:** A pre-proposal conference will be held at **2:00 P.M., on February 28, 2019, at the Administrative/Legislative Courthouse, 124 Bull Street, 3<sup>rd</sup> Floor Conference Room, 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.

**3.4 PROPOSAL DEADLINE:** The response to this 'Request for Proposal' must be received by the Purchasing Division no later than **5:00 P.M., March 14, 2019.**

For good and sufficient reason, up to 24 hours before the advertised deadline, the County may extend the response schedule. An addendum will be issued setting forth the new date and time.

**3.5 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.

**3.6 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.

**3.7 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.

**3.8 FORMAT OF RESPONSES:** To be considered, proponents must submit a complete response 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. Executive Summary
- B. Experience/Qualifications
- C. Service Plan
- D. Location and Accessibility
- E. M/WBE Participation
- F. References
- G. Fee Proposal
- H. Other Relevant Facts/Information.
- I. Required Document Attachments

Each proposal must be submitted in one (1) original and six (6) copies and one (1) electronic version of your RFP on thumb drive or CD to:

Ms. Robin L. Maurer, Asst. Purchasing Director  
Chatham County Purchasing Department  
1117 Eisenhower Drive - Suite C  
Savannah, GA 31406  
(912) 790-1623

**3.9 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.

**3.10 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.

- 3.11 **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.
- 3.12 **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](mailto:rlmaurer@chathamcounty.org)

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

- 3.13 **METHOD OF SOURCE SELECTION:** Chatham County is using the Competitive Sealed Proposal method of source selection, as authorized by Part 3 of the Chatham County Purchasing Ordinance 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.

- 3.14 **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, which will be scheduled after receipt of the written proposal and approval of the shortlist.

**4.4 CONTRACT:** 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 ***EXECUTIVE SUMMARY:*** The Executive Summary of the Proposal shall be limited to three (3) single-spaced typewritten pages. The purpose of the Executive Summary is to provide a high-level description of the offeror's ability to meet the requirements of the qualifications RFP.

4.5.2 ***EXPERIENCE/QUALIFICATIONS: TOTAL POSSIBLE POINTS: 25 (SECTION B)***

- A. Describe your organizational structure (please provide an organizational chart). Also include your mission statement and / or company philosophy and culture. Describe the staff retention program to assure continuity of service to the County.
- B. Confirm that you serve as a consultant and/or actuary, independently, and are not affiliated with any insurance company, third-party administrative agency or provider network.
- C. Describe your company's organization and management and provide a brief history of your organization. Describe your contractual relationships, if any, with organizations necessary to your qualifications and implementation of this RFP (e.g., actuarial services, data information services, etc.).
- D. Describe how long your organization has been providing benefit consulting and actuarial services, date established, size, expected future growth, number of employees, and number of years in business under the same name. Also include other clients currently assigned.
- E. Provide details of any changes in ownership that have occurred in the last five (5) years, details of any anticipated mergers, transfers of



organization or ownership, management or departure of key staff members within the next twelve (12) months.

- F. Indicate areas of development services in which the Consultant is qualified as it relates to Chatham County's benefits program. Provide information on the firm's experience on projects of similar size, function, and complexity for five (5) projects, in order of most relevant to least relevant, which demonstrate the firm's capabilities to perform the project at hand. The following project information must be provided: Project name, location, owner's contact, dates during which services were performed with a brief description of project. Provide any letters of reference/recommendation about the firm's performance on the project. List the names and roles of proposed team members, if any, who participated in these projects. (Maximum 10 pages-internet links to full project information may be included)
- G. Provide the name(s) of the staff member(s) who will be assigned to the County's account. Include a biography that highlights areas of expertise (to include education, professional qualifications and associations, and employment history), their role and responsibility. Staff assigned to the County's account shall have ten (10) years of benefit administration and/or client management experience. Experience in maintaining a high level of quality communication with clients, client's employees and vendors is required. Emphasis with public sector experience and clients is important.
- H. Each response must identify the names and addresses of any Subcontractors. If requested by the County, the Successful Respondent, and any other Respondent so requested, shall within seven days after the date of the request, submit to the County an experience statement with pertinent information as to similar projects and other evidence of qualification for each such Subcontractor, person and organization. If the County after due investigation has reasonable objection to any proposed subcontractor, supplier, other person or organization may, before giving the Notice of Award, request the Successful Respondent to submit an acceptable substitute without an increase in Contract Price. If apparent successful Respondent declines to make any substitutions, the County may award the contract to the next highest ranked Respondent that proposes to use acceptable subcontractors, suppliers and other persons and organizations. Any subcontractor, supplier, other person or organization listed and to whom the County does not make written objection prior to the giving of the Notice of Award will be deemed acceptable to the County subject to revocation of such acceptance after the Effective Date of the Agreement. In no event can services in excess of forty-nine (49) percent be subcontracted.
- I. Detail your experience in monitoring, and your ability to monitor, regulatory and legislative developments at both the state and federal level and how this information will be communicated to Chatham County.

- J. Outline your capacity to provide expertise in the areas of benefit plan analysis and design. Explain the types of analyses you have conducted relative to benefits analysis and design for insurance plans similar to this size.
- K. Provide a recent example of the selection and implementation of a new insurer or third party claims administrator. Detail how your company's experience and expertise benefited the client.
- L. What is the estimated percentage of clients that you have fully insured vs. self-funded in their group health benefit program?
- M. Provide the number of clients you currently serve who provide an Employee Health Center for their employees, and describe your involvement in consultation, measurement and strategy for such.
- N. If Chatham County made the decision to appoint your firm as its consultant and actuary of record, how would Chatham County rank in (1) size (employees and members) and (2) benefit plan cost in proportion to the balance of your business (estimates are acceptable).
- O. Include a discussion on the firm's financial stability and resources to perform the contract in a satisfactory manner and within the required time. Also include a listing of any lawsuit or litigation and the result of that action resulting from: (a) any project undertaken by the proposer or its subcontractors or affiliates where litigation is still pending or has occurred within the last ten (10) years; and (b) any type of project where claims or settlements were paid by the proposer or its insurers within the last ten (10) years.
- P. Provide a description of technical or professional support, available at no extra cost through the firm, such as legal counsel, communications, technology support or others.
- Q. List the principal insurance markets and carriers utilized by the firm in the order of premium volume placed with each market. This list should be categorized by line of coverage (medical, dental, life, AD&D, vision, short and long-term disability and EAP).
- R. Have your firm's services ever been terminated by a client, or has a client ended a contract with you prior to the termination date established in the contract?

**4.5.3 SERVICE PLAN: TOTAL POSSIBLE POINTS: 25 (SECTION C)**

- A. Describe in detail your service plan for Chatham County including how you will address each of our stated purposes and your proposed handling of the annual renewal process and negotiation strategy.
- B. Provide an example (without client name) of separate renewal and marketing financial analyses that you have presented to a client.
- C. Provide sample annual reports for your clients, and details on tools and models to be used.
- D. Provide a sample of your standard contract.

- E. Consultant shall utilize only those insurance carriers that have an A.M. Best rating not lower than (A) – Excellent and a financial category of VII or higher. Any exception to this requirement must have prior written approval of the Human Resources Director or their designee. A summary of the financial information on each insurer utilized or being proposed for the County’s consideration shall be provided annually. Should a change in insurers, plan design and / or plan funding be contemplated, confirm that the Consultant will compare plan design differences, insurance provider discounts, analyze stop-loss provisions, health care provider network matching, prescription disruption / comparison reports, as well as any other reports, comparison and / or analysis deemed standard or necessary. Also confirm the ability to run “what if” scenarios regarding possible plan design changes and the impact that would have had on the past claims year and Predictive Modeling for potential claims.
- F. Provide details on any resources your organization has available to address issues that might include claims management, plan design and wellness.

**4.5.4 LOCATION AND ACCESSIBILITY: TOTAL POSSIBLE POINTS: 5 (SECTION D).**

- A. Indicate the location of the office(s) that will handle Chatham County’s account, as well as the service rendered by each such office.
- B. Provide the name(s) and location of the staff member(s) who will perform work for the Chatham County. Also include a statement as to why each member is qualified to provide services for the Chatham County. List other clients currently assigned to the staff member(s). Indicate the availability and commitment to the project.

**4.5.6 M/WBE PARTICIPATION: TOTAL POSSIBLE POINTS: 15 (SECTION E):** 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.

**4.5.7 REFERENCES: TOTAL POSSIBLE POINTS: 5 (SECTION F):** Provide the names, contact information, and scope of services (brief description of pertinent insurance programs negotiated) of at least 3 public entities for which you are currently providing similar services, and at least 3 public entities for which similar services have been terminated. Include the number of covered employees for each entity, the time period services have been provided to each account, the total project cost and fee amounts, and a brief statement of the adherence to the schedule and budget for each project. Preference will be given for similar size and scope of services provided to other public entities.

**4.5.8 FEE PROPOSAL: TOTAL POSSIBLE POINTS: 25 (SECTION G)** Provide

your fee on the fee proposal form.

- A. It is anticipated that the agreement resulting from this solicitation, if awarded will be a firm fixed contract, based on a fee (not commission).
- B. Chatham County requires an all-inclusive cost structure. The selected firm's fee for compensation for insurance placement and benefit consulting should be outlined in detail. All contracts negotiated by your firm for service, programs or benefits for Chatham County will be negotiated on a zero commission basis. If a zero commission platform is not available for any service, program or benefit, the Human Resources Director and Benefits Manager will be notified in writing before negotiations can continue.
- C. Chatham County expects full disclosure of **ALL** compensation received from any source resulting from being named the consultant of record. An annual report of all fees, commissions, bonuses, contingencies, overrides, etc. on all insurance products is to be submitted annually to the County's Director of Human Resources.
- D. For all negotiations with insurance carriers or other providers of insurance products, the Consulting firm will act solely for the benefit of the County and its employees without regard for the benefit of the Consulting firm or any other person or entity. Confirm that the County's Human Resources Director and / or Benefits Manager, or their designee, will be included in all negotiations involved in placing of the County's insurance programs.

**4.5.9 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 PERFORMANCE AND APPROVAL OF SUB-CONSULTANTS:** The proponent will perform the project as an independent contractor and not as an agent or employee of the County. Joint ventures and sub-consultant arrangements are not prohibited; however, the proponent shall secure written permission from Chatham County before subcontracting any part of this service. Such permission should be obtained during the proposal evaluation stage. Proponents are encouraged to use Minority/Woman Business Enterprises and are reminded of reporting requirements when utilizing these arrangements.
- 4.8 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 PURPOSE OF REQUEST:** The purpose of this Request for Proposal is to solicit written Responses from qualified firms (the “Firm”) through competitive sealed Responses for the provision of benefits consulting and actuarial services. The consultant should be able to strategically plan, evaluate, consult, implement, and support our employee benefits programs, both current and future. The consultant should be well versed in the benefits market, experienced in advising comparable public agencies and able to work well with various levels of County staff and management. In addition to benefits consulting, it is the County’s desire to have the selected firm provide actuarial services for both our defined benefit pension plan and other post-employment benefits (OPEB) plan. The County believes that the combined role of a benefits consultant and an actuary will facilitate a more sustainable and strategic approach to benefits management.

**5.2 BACKGROUND AND EXISTING PLAN DESCRIPTIONS:**

Existing health and retirement benefits provided by Chatham County include:

**Health Benefits:**

Chatham County provides a self-funded health and pharmacy plan to more than 1500 full-time employees and their dependents and pre-65 retirees and their dependents. The health plan provides participants with a low option and a high option Point of Service (POS) plan, each with four tiers of coverage (Employee Only, Employee Plus Spouse, Employee Plus Child(ren), and Family). The employee contribution differential between the two options is moderate. Employees qualify for a premium reduction by participating in a points-based wellness activity program, and there is a premium surcharge for tobacco utilization. Chatham County funds the group health plan by employer and employee contributions based on the number of eligible full-time employees and retirees. The accumulated contributions are available to pay claims and administrative costs of the plan. The County purchases individual stop-loss insurance coverage.

Chatham County provides health insurance coverage to approximately 570 age 65+ retirees and their Medicare eligible dependents through a fully-insured Medicare Advantage plan that was implemented on January 1, 2016.

Chatham County provides, at no cost to employees, accidental death and dismemberment insurance, life insurance (the greater of annual salary or \$50,000 for each full-time employee), dependent life insurance, and long-term disability insurance. Employees may also purchase additional insurance products such as life insurance for themselves and dependents, short-term disability products and policies for cancer, vision, dental and pets. Chatham County offers flexible spending accounts for dependent care and medical and pharmacy expenses.

Chatham County offers a comprehensive wellness program administered by a full-time Wellness Coordinator. The hallmark of the wellness program is an Employee Health Center that is managed by a third party vendor. The health center provides acute care, well visits, health coaching, and laboratory services to employees and their spouses, and

pre-65 retirees and their spouses who are on the County's health plan, at no cost to the employee. They also receive free medications associated with their visit from a limited formulary. The Wellness Program provides a Diabetes and Pre-Diabetes Management program through a local hospital. In addition, employees receive incentives to participate in local health and wellness activities in the form of reimbursements for the cost of gym memberships, participation on walks and races, and Weight Watchers. Incentives are also provided for participating in various wellness challenges, such as weight loss or walking.

Funding for the County's medical and retiree benefits is mainly provided on a pay-as-you go basis. However, the County has established a Section 115 Trust for its OPEB liability. Asset values of the trust were \$67.5 million as of June 30, 2018, and the County's total OPEB liability was approximately \$350 million with a 21.3% funded ratio.

#### Retirement Benefits:

The County also provides a cost sharing defined benefit pension plan, the Chatham County Employees Retirement Plan, to eligible employees. The Plan provides retirement, disability and death benefits to plan members and their beneficiaries. Contributions to the plan are actuarially determined. Covered employees are required to contribute 3.5% of their annual salary to the plan and the County annually provides its actuarially determined annual contribution. The Plan's total membership as of July 1, 2017 was 2,393 of which 1,543 were active plan members, 42 were terminated plan members not yet receiving benefits, and 808 were disabled employees, retirees and beneficiaries receiving benefits. As of June 30, 2018 the Total Pension Liability was \$300.7 million with an 87.81% funded ratio, and asset values were \$270 million.

County employees may make voluntarily contributions to a 457(b) Plan administered by Empower. The County does not provide any matching contributions to the 457(b) plan.

More information on the County's trust funds is available in the County's Comprehensive Annual Financial Report (CAFR) available at [www.chathamcounty.org](http://www.chathamcounty.org) on the Finance Department tab.

### **5.3 SCOPE OF WORK:**

Chatham County seeks to retain a benefits consulting firm to strategically plan, consult, implement, and support our employee benefits programs. The selected firm will also provide actuarial valuations annually for the County's pension plan and bi-annually for the County's OPEB trust fund, as well as formulating COBRA rates, ACA fees and other calculations as requested. Our goal is to select the firm best able to guide us in achieving the most beneficial plan designs with the best insurance carriers and benefits providers, all within the context of achieving sustainable benefits for our workforce and retirees.

The benefits consulting firm is expected to take a lead role with Request for Proposals

and market checks by evaluating and identifying high value proposals and comprehensive services for each benefit offered to Chatham County employees, including but not limited to:

- Third-party administrator for self-funded health and pharmacy plan
- Dental plan
- Basic Life Insurance with AD&D
- Optional Life Insurance
- Vision Insurance
- Long-Term Disability
- Medicare Advantage Plan with Prescription Drug Coverage

The County is particularly interested in a benefits consulting firm who can offer creative, innovative approaches, with a proven track record, that allows the County to maintain quality benefits and contain or reduce costs. The selected consulting firm will perform a full range of benefit program services related to the acquisition, implementation, maintenance, and enhancement of the County's employee insurance benefits. The contracted firm must have all the necessary, valid and current licenses to do business in the State of Georgia as issued by the respective State Boards and Government Agencies responsible for regulating and licensing the services to be provided and performed. . The firm shall have at least ten (10) consecutive years of experience in Georgia, providing consultant and benefits consulting services to public and private entities. The firm shall have experienced management staff, who possess comprehensive knowledge of benefit administration provided to jurisdictions whose service populations are similar in size and complexity to the County's. The firm shall possess knowledge of applicable laws, regulations and codes and shall be familiar with local conditions and trends relating to group insurance in Georgia. The selected consulting firm shall provide services, including, but not limited to, the following:

#### **5.3.1 Analysis and Reporting**

- Analyze existing coverage levels and costs;
- Identify and develop cost-saving alternative benefit strategies and plans. Provide innovative approaches to benefit challenges facing Chatham County and recommendations for benefit plan changes.
- Lead County staff in the identification of short and long-range goals and strategies, including making projections of potential savings. Outcomes could include a number of options related to health and retirement benefits with the ultimate development of a five to ten year plan.
- Analyze and make recommendations based on utilization and performance reports, statistical and financial reports, and plan specific data.
- Assist the County in pro-actively monitoring and analyzing experience trends. Provide timely alerts on changing patterns and suggest appropriate recommendations.

- Provide, maintain and update comparison reports of other public and private (local) companies' benefit plan offerings and costs, to determine their competitiveness with the County's programs.
- Provide financial and performance reviews of self-funded and fully insured plans and programs for current year and upcoming plan year.
- Be available to prepare, provide and present various types of reports as needed, such as cost analysis for benefit changes, and other statistical, financial, forecasting, trend, or experience reports, as well as new products and audits, as requested.
- Regularly monitor and evaluate performance measures and guarantees for providers.
- Maintain full and accurate records with respect to all matters and services provided on behalf of the County's benefit plans and programs. Provide County staff and officials all spreadsheets, assumptions and calculations upon completion of any project performed on behalf of the County's benefit plans and programs.
- Provide summary of activity on open, ongoing claims.
- Provide recommendations for the most advantageous stop loss levels, based on claims projections and predictive modeling.
- Provide quarterly management reports for all benefit products, monthly reports required on the health insurance plan, as well as periodic meetings to discuss data and strategy.

### 5.3.2 **Liaison and Problem Intervention**

- Act as liaison with (and between) the County, insurance carriers and providers.
- Attend, as needed, meetings with County staff and/or elected officials to facilitate and assist in the management of the County's employee benefits plans.
- Act as an advocate or ombudsman in appeal, arbitration or court process between the County and the providers on unresolved issues if needed; provide advice when needed to enforce County, employee, or their dependents' rights.
- Assist the County in proactive mitigation of negative impacts or disruption of services to employees from benefit and provider network changes.
- Represent Chatham County in all negotiations with providers on all issues, including, but not limited to those related to fees, discounts, benefit levels, plan design, plan documents, networks, customer service and special terms and conditions.

### 5.3.3 **Compliance**

- Assist with ongoing plan administration and ensure that County benefit programs comply with State and Federal legislation.
- Provide regulatory updates and best practices for the effective administration of benefit plans.



- Review and disseminate information to County staff, on an ongoing basis, regarding new or revised State and Federal legislation that impacts benefit programs.
- Assist County staff to ensure compliance with all mandated reporting and posting/notice requirements for benefit plans.
- Provide Valuation reports based on timelines established by the County Finance Director. Valuation reports should provide all information required for annual financial reporting under GASB standards as well as the reporting requirements of the State of Georgia. The County requires an annual valuation report for its pension plan and a bi-annual valuation report for its OPEB plan.
- Provide other functions and specialized calculations related to pension benefits as requested.

#### 5.3.4 **Annual Renewal Process and Evaluation of Health Benefits**

- Provide quarterly reports outlining the status, utilization, trends, and cost analysis of benefits programs. This report should outline suggestions and recommendations for various plan options.
- Establish a strategy for benefits, both annually and three (3) to five (5) years in the future to determine goals and impact. Consider trends, prospective legislations, new delivery systems, and forecast of market conditions, expectations of renewals and geographic health-care practices to make both short and long-term projections.
- Review and make cost-saving recommendations regarding the modification of plan design, benefit levels, funding options, communications and quality of current employee benefit plans.
- Determine annual estimates of renewal rates and cost trends and assist County staff in preparation of budget figures.
- Conduct thorough and applicable market research in preparation for contract renewals. Include evaluation of overall insurance programs compared to similar employers (both public and private).
- Prepare specifications and compile data, obtain quotes and proposals, analyze and compare proposals and negotiate rates.
- Make recommendations, as well as representation for items of negotiation with carriers, including, but not limited to, benefit levels and plan design, premiums / funding options, quality of service, performance measures and guarantees, contractual terms and conditions, quality assurance standards and return on investment, where applicable.
- Review rate proposals, contracts and plan documents to ensure underlying assumptions are appropriate and accurate to the County.

#### 5.3.5 **Other Service Requirements**

- Assist in the evaluation of the County's employee wellness program, to improve employee health and reduce employee health-care costs, both in the

short and long-term.

- Provide timely research and responses to technical questions posed by County staff.
- Provide guidance and recommendations on items such as, but not limited to, trends in benefits plans, methods for improving cost containment, financial arrangements and administration.
- Provide access to published benefit-related survey information.
- Complete and provide a service analysis for areas of improvement.
- Work collaboratively with other consultants and County staff.
- Manage plan transitions as necessary.
- Provide bill reconciliation for vision, dental, health and Medicare Advantage plans.

### 5.3.6 Actuarial Services

The County seeks a credentialed firm to provide actuarial valuations annually for its defined benefit pension plan and every other year for its OPEB plan. The main purposes of the valuation report are i) to identify the recommended annual employer contribution in sufficient time to incorporate the amount into the County's annual budget process, ii) to disclose the financial condition of the plans, and iii) to provide information to meet disclosure and reporting requirements of Georgia law, GASB and GAAP. It is expected that the firm will calculate costs and liabilities of the plans under generally accepted actuarial principles and on the basis of actuarial assumptions and methods which are reasonable to present the best estimate of anticipated plan expenditures.

The two (2) plans currently have the following summary liability and funding information:

Total OPEB Liability	\$350,387,000	
Net Fiduciary Position	<u>74,554,000</u>	
Net OPEB Liability	<u>\$275,833,000</u>	21.3% funded
Total Pension Liability	\$300,276,245	
Net Fiduciary Position	<u>263,687,324</u>	
Net Pension Liability	<u>\$ 36,588,921</u>	87.81% funded

Additional information on the plans may be obtained upon request.

**Chatham County desires an open communication with selected insurance carriers (vendors) for all lines of benefits. Chatham County does not approve or promote the Consultant firm being the only point of contact for the County, and desires to be copied on all communications.**

## SECTION VI

### EVALUATION AND AWARD ANNUAL CONTRACT FOR BENEFITS CONSULTING AND ACTUARIAL SERVICES FOR CHATHAM COUNTY

**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>Experience/Qualifications</i>	25
<i>Service Plan</i>	25
<i>Locations and Accessibility</i>	5
<i>M/WBE Participation</i>	15
<i>References</i>	5
<i>Fee Proposal</i>	25

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 services shall be provided 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. 19-0019-7  
BENEFITS CONSULTING AND ACTUARIAL SERVICES FOR CHATHAM COUNTY**

**FEE PROPOSAL FORM**

I have read and understand the requirements of this proposal, RFP #19-0019-7, and agree to provide the required services in accordance with this proposal, and all other attachments, exhibits, etc. The proposed fee shall include all labor, material, equipment, insurance to provide the services as outlined including any travel or per diem expenses and any other miscellaneous expenses involved.

<b>Year 1</b>	\$ _____
<b>Year 2</b>	\$ _____
<b>Year 3</b>	\$ _____
<b>Year 4</b>	\$ _____
<b>Year 5</b>	\$ _____
<b>FIVE YEAR TOTAL</b>	\$ _____

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 **ANNUAL CONTRACT FOR BENEFITS CONSULTING AND ACTUARIAL SERVICES FOR CHATHAM COUNTY (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 Presents, 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 **ANNUAL CONTRACT FOR BENEFITS CONSULTING AND ACTUARIAL SERVICES FOR CHATHAM COUNTY** 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

**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.

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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.

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

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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.

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

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6. List any contracts not completed on time.

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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.

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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: \_\_\_\_\_

DPC Form #45



**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:  
\_\_\_\_\_

**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:

**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 ( ) \_\_\_\_\_

**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:

**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: \_\_\_\_\_

LEGAL NOTICE

CC NO. 167424

REQUEST FOR PROPOSALS

Sealed proposals will be received until **5:00 P.M. on MARCH 14, 2019** in Chatham County Purchasing and Contracting Department, **1117 EISENHOWER DRIVE, SUITE C, SAVANNAH, GA. RFP NO. 19-0019-7 ANNUAL CONTRACT FOR BENEFITS CONSULTING AND ACTUARIAL SERVICES FOR CHATHAM COUNTY.**

**A PRE-PROPOSAL CONFERENCE** will be held at **2:00 P.M., on FEBRUARY 28, 2019, AT THE CHATHAM COUNTY ADMINISTRATIVE/LEGISLATIVE COURTHOUSE, 124 BULL STREET, 3<sup>RD</sup> FLOOR CONFERENCE ROOM, 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

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SAVANNAH N/P INSERT: February 14, 2019