

INVITATION TO SUBMIT  
PROPOSAL

**REQUEST FOR PROPOSALS - RFP NO. 21-0128-3 (RE-BID)**

**CPA SUPERVISION OF REVIEW OF CONSERVATOR REPORTS**

**PROPOSALS RECEIVED BY: 5:00 P.M., NOVEMBER 2, 2021**

THE COMMISSIONERS OF CHATHAM COUNTY, GEORGIA

CHESTER A. ELLIS, CHAIRMAN

COMMISSIONER HELEN J. STONE

COMMISSIONER LARRY RIVERS

COMMISSIONER BOBBY LOCKETT

COMMISSIONER TANYA MILTON

COMMISSIONER AARON R. WHITELY

COMMISSIONER PATRICK FARRELL

COMMISSIONER DEAN KICKLIGHTER

COMMISSIONER KENNETH A. ADAMS

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 DISQUALIFYING.**

X GENERAL INFORMATION

X PROPOSAL

N/A BONDS

X PROPOSAL SCHEDULE

X LEGAL NOTICE

X ATTACHMENTS: A. DRUG FREE WORKPLACE; B. NONDISCRIMINATION STATEMENT; C. DISCLOSURE OF RESPONSIBILITY STATEMENT; D. CONTRACTOR AFFIDAVIT/AGREEMENT; E. BIDDER'S CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUDEION; 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 proposal.

BY: \_\_\_\_\_  
SIGNATURE:

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

\_\_\_\_\_  
TITLE:

\_\_\_\_\_  
COMPANY:

RECEIPT IS HEREBY ACKNOWLEDGED OF ADDENDA NUMBERS \_\_\_\_\_

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 strongly encouraged to report ownership status. A minority or woman owned business is defined as a business with 51% or greater minority of woman ownership. Please check ownership status as applicable:

African-American \_\_\_\_\_ Asian American \_\_\_\_\_ Hispanic \_\_\_\_\_

Native American or Alaskan Indian \_\_\_\_\_ Woman \_\_\_\_\_

**CHATHAM COUNTY, GEORGIA  
OFFICE OF THE PURCHASING AND CONTRACTING  
1117 EISENHOWER DRIVE, SUITE C  
SAVANNAH, GEORGIA 31406  
(912) 790-1624**

**DATE: October 18, 2021**

**RFP NO. 21-0128-3**

**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, Savannah, Georgia** up to **5:00 P.M., November 2, 2021.** 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.

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.

**SECTION I  
INTRODUCTION AND INFORMATION**

- 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 a sufficient time to ensure receipt by the Purchasing Director on or before 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 31406**

**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 specification 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 the 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** **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.

- 1.11** **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:
- A. 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;
  - B. 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
  - C. 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:**

**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.

- A. **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.
- B. **Reporting Provisions:** Any failure to comply with reporting provisions of the policies shall not affect coverage provided in relation to this request.
- C. **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.
- D. **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.
- E. **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.

- F. **Lapse in Coverage:** A lapse in coverage shall constitute grounds for contract termination by the Chatham County Board of Commissioners.
  
- G. **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 sub proposers. 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 WITHDRAWAL OF PROPOSAL:** Proposals may be withdrawn by submitting a written request to the County prior to the stated deadline for the receipt of proposals. Withdrawal of a proposal by any firm will not prejudice the right of the proponent to submit a new proposal, providing the latter is received timely as provided herein.
- 2.17 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.
- 2.18 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.
- 2.19 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) 652-7828 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 accepting proposals from qualified firms of certified public accountants [“CPA Firm”] to provide supervised staff [“Review Staff”] [1] to review confidential financial reports filed by conservators for adult and minor wards in the Probate Court of Chatham County for a period of fifteen months ending on December 31, 2022, and [2] to collaborate with Probate Staff to improve on the financial review process to effectively hold conservators accountable and protect adult wards and minors. Probate Court is working to overcome a backlog of financial reports and requires qualified assistance to protect vulnerable adults and minors.

The purpose of the review is to support and assist Probate Court in its statutory obligation to examine each return of a conservator to assure that the conservator is acting in the ward’s best interest and exercising reasonable care, diligence and prudence in maintaining complete and accurate records of all of their actions, transactions and dealings.

Because most reports are filed by lay conservators without advice of counsel or accountant, Probate Court works with standardized forms intended for lay people and is committed to developing a realistic and efficient process of reviewing reports to achieve oversight adequately safeguarding vulnerable wards. Probate Court intends to collaborate with the CPA Firm and Review Staff to improve on the review process.

The standard for review will be based upon Georgia statutes pertaining to conservatorships informed by accounting procedures and standards relevant to reviewing financial reports. The review will not constitute a formal audit. Reviewers will be expected to be objective, free from undue influence, confidential, thorough, competent and professional. The goal of each review will be protection of incapacitated adults or minors and the ultimate standard is the best interest of the ward.

Probate Court intends to refer up to 30 cases per month involving two reports per ward (1. Inventory and Asset Management Plan and 2. Annual Return) along with the prior approved reports, if any. Probate Court anticipates that each case will require on average of one hour for a Review Staff under the supervision of a certified public accountant to review and complete a review report form to be returned to Probate Court. Probate Court will provide education and forms to the Review Staff and supervising CPAs at commencement of services. Probate Court will expect reviews to be completed within fourteen (14) days. The selected firm and all individual Review Staff participating in reviewing conservator reports will be required to sign confidentiality agreements and reports will be shared digitally through a secure portal approved by Chatham County ICS and the CPA Firm.

The two report forms currently used are attached hereto. The Inventory and Asset Management Plan is a standardized form approved by the Georgia Council of Probate Courts and not subject to

change locally. The Annual Return is a form currently used in Probate Court and subject to change based upon staff recommendations and the Judge's discretion. Also attached is a draft of an Annual Return Checklist for Conservatorships which would be required for each review.

Review Staff and the CPA Firm will participate in up to three (3) hours of training provided by Probate Court at the inception of the contract term and will participate monthly in WebEx conferences with Probate Court Staff to collaborate in improving the review process and forms. Review Staff will be provided with contact information for Probate Court staff who can answer questions or provide guidance Monday-Friday 8am - 5pm.

**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. Site visits **may** be requested as part of the interview process.

**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. October 15, 2021.**

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.

**3.4 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 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
- F. Fee Proposal
- G. References
- H. Other Relevant Facts/Information.
- I. Required Document Attachments

Each proposal must be submitted in one (1) original and three (3) copies and one (1) electronic version of your RFP on thumb drive or CD to:

Ms. Lori Holdorf, Procurement Specialist  
Chatham County Purchasing Department  
1117 Eisenhower Drive - Suite C  
Savannah, GA 31406  
(912) 790-1624

**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. Lori Holdorf, Procurement Specialist, 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: Lori Holdorf, Procurement Specialist  
1117 Eisenhower Drive, Suite C Savannah,  
GA 31406  
(912) 790-1627 (FAX)  
[lholdorf@chathamcounty.org](mailto:lholdorf@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 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.

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

#### 4.4 **PROPOSALS MUST BE RESPONSIVE TO:**

##### 4.4.1 ***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.

##### 4.4.2 **QUALIFICATIONS AND EXPERIENCE TOTAL POSSIBLE POINTS: 25 (SECTION B):**

- a) Experience and qualifications of the firm. Proposer should provide examples of engagements, if any, of a similar nature and in particular those related to court operations
- b) Resumes of proposed review staff who will be utilized for this engagement
- c) References from similar clients with contact names and phone numbers

##### 4.4.3 **METHODOLOGY/IMPLEMENTATION PLAN TOTAL POSSIBLE POINTS: 30 (SECTION D):**

- a) Probate Court will provide education on probate law, statutory rights of wards, duties and responsibilities of conservators and the attached forms. After reviewing the attached (1) Inventory and Asset Management Plan and (2) Annual Return forms, discuss how you would utilize the information required in these forms to discern if the conservator is acting in the best interest of the Ward and exercising reasonable care, diligence and prudence in maintaining complete and accurate records of all of their actions, transactions and dealings.
- b) Discuss the methodology you would expect reviewing staff to use in reviewing financial reports to determine accuracy and accountability by a fiduciary. Attached is an example of an Annual Return Checklist for Conservatorships that will be provided by Probate Court which would be subject to improvement based upon collaboration between Court and Review Staff.
- c) Conservators are often not represented by an attorney or financially sophisticated. Discuss your firm's experience with financial reporting or record keeping by lay people acting in fiduciary capacities and provide an example of a review conducted by your firm in which the purpose was to detect theft, misuse of funds, wasting of assets, inaccuracies, incompetency or omissions by a lay fiduciary.
- d) Probate Court will be seeking ongoing input from reviewing staff and supervising CPA on how to improve the reporting and review process. Discuss any experience your firm has had collaborating with an outside agency or governmental department to refine and



improve upon data collection and review for purposes of fiduciary oversight and accountability.

- e) Each CPA and Review Staff will be required to sign a confidentiality agreement and digital copies will be share with your firm by a secure and confidential system. Discuss how your firm would securely receive, maintain, return and dispose of confidential documents pertaining to guardianships and conservatorships pending in Probate Court.

4.4.4 ***M/WBE PARTICIPATION: TOTAL POSSIBLE POINTS: 15 (SECTION E):*** Commitment in the level of MWBE firms, subcontractors, consultants and employees. Approach to meeting and exceeding the MWBE requirements. History of Minority-owned, Women-owned business utilization.

4.4.5 **FEE PROPOSAL – TOTAL POSSIBLE POINTS: 25 (SECTION F):**

Provide the basis for your fee on the fee proposal form provided. Your fee for the project should be based on staff review of the most recent Inventory and Asset Management Plan and Annual Return filed as well as previously filed reports, if any, for each case referred. Your fee should be based on a unit price per case referred anticipating that review and reporting would take on average one hour per case. Probate Court anticipates referring up to 30 cases per month which will require an average of one hour to review. Additionally, Probate Court anticipates no more than three (3) hours of training and monthly WebEx meetings to share ideas for improvement or questions.

4.4.6 **REFERENCES-TOTAL POSSIBLE POINTS: 5 (SECTION G):**

- a) Provide a minimum of three (3) references of current or past clients for whom you review financial reports involving fiduciary relationships.
- b) References should be of a similar size and scope of services, if possible.

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

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

4.6 **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.

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

## **SECTION V SCOPE OF WORK**

### **5.1 GENERAL INFORMATION:**

- a. Probate Court anticipates referring up to 30 cases (at least two reports per case) per month which will require an average of one hour to review and complete and return a report form. Additionally, Probate Court anticipates no more than three (3) hours of training at the inception of the contract and monthly WebEx meetings to share ideas for improvement or questions.
- b. Probate Court will designate staff to answer questions and provide documentation. Probate Court will facilitate conversations between Review Staff and conservators if documentation or information is requested.
- c. All work must be completed within the U.S. with no overseas outsourcing.
- d. Any data collected from this project cannot be resold by vendor in any way.
- e. All data must be stored on servers residing within the U.S. while in vendor's custody.
- f. Contractor will provide work to the highest standards
- g. Funding under any services contract is contingent on the receipt of said local funds and grant funds.

### **5.2 BACKGROUND:**

Each of Georgia's 159 counties has a Probate Court. Probate Court has jurisdiction over adult and minor conservatorships and is required by law to collect and review annual financial reports from every conservator. Probate Court has developed a significant backlog and the backlog will continue to grow as Probate Court staff tracks down delinquent conservators.

Probate Court has not historically digitized files, tracked wards or conservators or collected financial reports. Hence, Probate Court was not sufficiently staffed to handle those responsibilities. Probate Court is attempting to digitize older files, track wards and conservators and collect and review returns. Probate Court will have additional temporary staff but needs assistance and expertise to overcome a backlog and develop a system of reviewing that onsite staff can eventually accomplish.

### **5.3 VISION:**

Probate Court is dedicated to systematizing annual reminders, collection efforts and meaningful review and accountability for every conservator appointed in the past or future. Overcoming the current backlog is essential to that vision.

### **5.4 GOALS**

This Request for Proposals (RFP) is issued by Chatham County and the Clerk of Probate Court to procure proposals for the following:

- A. Engaging a qualified accounting firm to complete reviews financial reports of conservators to address the backlog caused historically and due to COVID.
- B. Engaging a qualified accounting firm in a collaboration with Probate Court staff to improve upon the process of reviewing financial reports of conservators to assure that conservators are acting in their ward's best interest and exercising reasonable care, diligence and prudence in maintaining complete and accurate records of all of their actions, transactions and dealings.

**5.5 PROJECT OBJECTIVES**

The vision and **Requirements** for this project is to procure the following:

- A. Complete review of thirty (30) conservators' financial reports per month for a period of fifteen months ending on December 31, 2022.
- B. Collaborate to improve upon the review process and instruments to assure meaningful accountability of conservators appointed by Probate Court.

**5.6 OPERATING ENVIRONMENT**

The review work will be conducted by the Review Staff in their offices and Probate Court will provide reports to be reviewed digitally by a secure method of transmittal.

**REQUEST FOR PROPOSAL  
CHATHAM COUNTY, GEORGIA**

**FEE PROPOSAL FORM  
RFP NO. 21-0128-3**

**CPA SUPERVISION OF REVIEW OF CONSERVATOR REPORTS**

<b>Description</b>	<b>U/M</b>	<b>Unit Cost</b>
Review of Financial Reports	Per case	\$

**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.

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

**CPA SUPERVISION OF REVIEW OF CONSERVATOR REPORTS**

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, dispensation, 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 procurement **CPA SUPERVISION OF REVIEW OF CONSERVATOR REPORTS** 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 there from;
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 an 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 contractor 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.

---

I, \_\_\_\_\_, as \_\_\_\_\_  
Name of individual Title & Authority

of \_\_\_\_\_, declare under oath that the above statements,  
Company Name

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:



**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 \_\_\_\_\_, \_\_, 201\_\_ 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 \_\_\_\_\_, 201\_\_.

\_\_\_\_\_  
NOTARY PUBLIC  
My Commission Expires:  
\_\_\_\_\_

**ATTACHMENT E**

***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 F**

**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 G**

**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 H**

**AFFIDAVIT REGARDING LOBBYING**

Each Bidder/Proposer and all proposed team members and sub-consultants 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. 168483**  
**REQUEST FOR PROPOSALS**

Chatham County, Georgia seeking proposal from responsive and qualified firms that will provide services associated with “CPA REVIEW OF CONSERVATOR REPORTS”

Proposals are due by **November 2, 2021, 5:00 P.M.** and must be mailed or hand delivered to the Chatham County Purchasing Office, 1117 Eisenhower Drive, Suite C, Savannah, Georgia, 31406.

Specifications can be downloaded from the County’s website at <http://purchasing.chathamcounty.org> and are available in Chatham County Purchasing Office, at the address listed above. For additional information concerning specifications, please contact Lori Holdorf, at (912) 790-1624. Bidders are not to contact a department directly. 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 ALL BIDS AND TO WAIVE ALL FORMALITIES. “CHATHAM COUNTY IS AN EQUAL OPPORTUNITY EMPLOYER, M/F/H, ALL BIDDERS ARE TO BE EQUAL OPPORTUNITY EMPLOYERS”.

  
MARGARET H. JOYNER, PURCHASING DIRECTOR  
CHATHAM COUNTY, GEORGIA