



## Savannah-Chatham County Public School System

208 Bull Street / Savannah, Georgia 31401 / (912) 395-5600

April 13, 2021

Ladies and Gentlemen:

The Savannah-Chatham County Public School System ("SCCPSS") would like to take this opportunity to announce that it is requesting proposals for **RFP 21-52 – Excess Worker's Compensation Insurance Broker (Annual Contract)**.

Enclosed is a Request for Proposals ("RFP") packet, which provides instructions for the submission of proposals and identifies the goods and/or services requested by the SCCPSS. **Due to the COVID-19 epidemic, all proposals should be submitted electronically in the PDF format by email to the following SCCPSS Purchasing Department email address: [purchasing@sccpss.com](mailto:purchasing@sccpss.com).**

Proposals must be received by email prior to **Tuesday, May 11, 2021 at 11:00:00 A.M.** (as determined by the timestamp assigned by the District's e-mail program). **Time is of the essence, and any proposal received on or after this deadline for submission will not be accepted.** Offerors are responsible for ensuring that their proposals are timely received and registered by Purchasing Department personnel. If an Offeror does not receive an email confirmation that its proposal has been received and registered during normal business hours of 9:00am to 5:00 p.m. on the day the proposal is sent or by **Tuesday, May 11, 2021 at 10:59:99 A.M.**, then Offerors should email or call the purchasing department at (912) 395-5572 to confirm receipt. While the SCCPSS will accept all proposals received by the [purchasing@sccpss.com](mailto:purchasing@sccpss.com) email account by **10:59:99 A.M.**, **Offerors should not wait until the last minute to submit proposals. Any proposals received after 10:59:99 A.M. will be rejected.**

It shall not be sufficient to show that the proposal was sent by email before the scheduled deadline.

All proposals must be submitted RFP name, number, and closing date and time clearly marked on the subject line of the submitting email. A copy of the proposal register will be posted on the District's website after the closing date.

**While all forms are required, Offerors will not be required to submit notarized forms with their initial proposal due to COVID-19. However, all forms must be signed. The successful Offeror will be required to submit notarized forms when normal operations resume. If the successful Offeror fails to supplement the notarized forms with notarized copies or if it appears that a form originally submitted was false, then the District reserves the right to rescind any contract before or after award and/or hold the Offeror liable for damages.**

If an offeror is unable to submit a proposal at this time but would like to remain on the list of potential vendors for the SCCPSS, please complete and return only the "No Proposal Statement Form" included with this RFP packet and clearly mark the outside of the envelope with the words "No Response."

If you have any questions concerning this solicitation, please submit them in writing to **Katrina L. Hagan, Purchasing Agent** at [purchasing@sccpss.com](mailto:purchasing@sccpss.com). Please note that all communications relating to this solicitation must be directed to the Purchasing Department in writing to [purchasing@sccpss.com](mailto:purchasing@sccpss.com) pursuant to SCCPSS policy.

Thank you for your interest in responding to this RFP.

Sincerely,

Sabrina L. Scales, CPPB  
*Purchasing Director*

**Mission** - To ignite a passion for learning and teaching at high levels.  
**Vision** - From school to the world: All students prepared for productive futures  
*"AN EQUAL OPPORTUNITY EMPLOYER"*

## REQUEST FOR PROPOSALS (RFP) #21-52

### I. INTRODUCTION

The Board of Public Education for the City of Savannah and the County of Chatham (the “Board”), the body corporate responsible for public education in Chatham County, which is commonly known as the Savannah-Chatham County Public School System (“SCCPSS”), seeks sealed proposals for **Excess Worker’s Compensation Insurance Broker (Annual Contract)** as specified in this Request for Proposals (“RFP”).

It is worth noting at the outset that the competitive sealed proposal (RFP) process differs from competitive sealed bidding in two important ways:

- 1) It permits discussions with competing Offerors and changes in their proposal including price; and
- 2) It allows comparative judgmental evaluations to be made on various criteria (in addition to cost) for award of the contract.

Vendors who wish to be awarded a contract by the Board to provide the goods and/or services requested by this RFP shall be referred to herein as the “Offeror(s).” To be considered for an award of a contract under this RFP, Offerors should carefully read this solicitation document, which is called **Request for Proposals (RFP) # 21-52**, and all of the forms, product specifications, service requirements, contract documents, or other materials that may attached hereto or referenced herein. This RFP and the associated documents identify the goods and/or services requested by the SCCPSS, contain the instructions for preparing and submitting proposals, and outline the process by which the Board will award a contract for those goods and/or services, if it decides to award a contract at all.

### II. GENERAL TERMS AND CONDITIONS FOR THIS RFP

#### **A. A “Cone of Silence” Applies to this RFP.**

A “Cone of Silence” is imposed upon this RFP after advertising and terminates at the time the Board awards a contract. The Cone of Silence prohibits any communications by written, oral, or electronic form by, or on behalf of, a prospective Offeror for this solicitation, including any persons affiliated with or in any way related to a prospective Offeror, and any member of the Board of Education, the superintendent or her staff, any persons involved in evaluating the bid, program managers, or members of any selection committee. The Cone of Silence is intended to prohibit lobbying for, or against, a particular vendor or vendors and to prevent prospective Offerors from circumventing the process for selection set forth in this RFP.

The Cone of Silence does not apply to oral communications with the Director of Purchasing, or the Director of Purchasing’s designees, at pre-proposal conferences, site visits (as applicable), presentations before selection committees, or contract negotiations with offerors selected for award. Written communications expressly authorized by this solicitation, such as (1) the submission of the proposal itself, (2) requests for interpretation, requests for material substitutions, protests, or similar inquiries to the purchasing department, (3) documents circulated at oral presentations before selection committees, or (4) documents circulated in connection with contract negotiations with the Offeror(s) selected for award are also permitted in communication with the Director of Purchasing or the Director of Purchasing’s designees. The Cone of Silence does not apply to presentations allowed by Board policy or to the Board of Education at a duly called public meeting.

In addition to any other penalties provided by law, violation of the Cone of Silence by any Offeror may result in the rejection of the Offeror’s response and disqualify the Offeror from being awarded any contract as a result of this solicitation. Any person having personal knowledge of a violation of these provisions shall immediately report such violations to the District’s Purchasing Department.

#### **B. The Goods and/or Services Requested by the SCCPSS.**

The goods and/or services requested by the SCCPSS in this RFP are described in more detail in “Attachment A- Goods and/or Services Requested, Format of Proposals, Evaluation Criteria for Award, and

Contract Requirements,” which is incorporated into this RFP by this reference.

**C. The Advertising Dates for this RFP.**

This RFP is being advertised on the Purchasing Department page of the SCCPSS website, <http://internet.savannah.chatham.k12.ga.us/> and on the Georgia Procurement Registry (GPR) from **December 15, 2020 until the deadline for submitting proposals.**

The advertising date(s) for this Request for Proposals (RFP) in the Savannah Morning News are as follows:

**Tuesday, April 13, 2021,  
Tuesday, April 27, 2021**

**D. Pre-Proposal Conference Held by the Purchasing Department.**

**For this solicitation, there will be NO Pre-Proposal Conference held.**

Offerors should be advised that while attendance at the pre-proposal conference for this RFP is not required, attendance may be required at an interview scheduled after the submission of proposals for this RFP.

Offerors should also be advised that other SCCPSS RFPs may require attendance at a pre-proposal conference as a condition to being deemed a “responsive” and “responsible” Offeror eligible for a contract award.

**E. The Deadline for Submitting Proposals in Response to this RFP.**

The deadline for submitting proposals in response to this RFP, unless extended by the SCCPSS, shall be as follows:

**May 11, 2021 @ 11:00:00 AM**

**Time is of the essence, and any proposal received on or after this deadline for submission will not be accepted.** Proposals must be received by email **prior to Tuesday, May 11, 2021 at 11:00:00 A.M.** (as determined by the timestamp assigned by the District’s e-mail program). Offerors are responsible for ensuring that their proposals are timely received and registered by Purchasing Department personnel. If an Offeror does not receive an email confirmation that its proposal has been received and registered during normal business hours of 9:00am to 5:00 p.m. on the day the proposal is sent or by Tuesday, May 11, 2021 at 10:59:99 A.M., then Offerors should email or call the purchasing department at (912) 395-5572 to confirm receipt. While the SCCPSS will accept all proposals received by the [purchasing@sccpss.com](mailto:purchasing@sccpss.com) email account by 10:59:99 A.M., **Offerors should not wait until the last minute to submit proposals. Any proposals received after 10:59:99 A.M. will be rejected.**

It shall not be sufficient to show that the proposal was sent by email before the scheduled deadline. Furthermore, the only clock that shall matter for the purposes of determining the timely receipt of email submissions is the timestamp assigned by the District’s e-mail program to the email account associated with the following email address: [purchasing@sccpss.com](mailto:purchasing@sccpss.com).

This deadline may be extended for all prospective Offerors within the discretion of the Director of the Purchasing Department or her designee for any reason. A non-exclusive list of reasons why the deadline may be extended include: the issuance of addenda to this RFP or the associated specifications, a total absence of proposals, SCCPSS closure due to inclement weather, etc. The Director of the Purchasing Department will either extend the deadline for all Offerors or not all.

## **F. Delivery and Submission of Proposals.**

Offerors shall timely deliver proposals by email to [purchasing@sccpss.com](mailto:purchasing@sccpss.com). The proposal and all required forms shall be submitted as PDF document attached to the email.

All proposals must be submitted RFP name, number, and closing date and time clearly marked on the subject line of the submitting email.

Please include with your proposal all documents requested by this solicitation, including, but not limited to, a copy of your firm's current business license and certificate of insurance. **Failure to include all of the information and/or documents requested by this solicitation could result in the offeror's proposal not being considered by the SCCPSS.**

**While all forms are required, Offerors will not be required to submit notarized forms with their initial proposal due to COVID-19. However, all forms must be signed. The successful Offeror will be required to submit notarized forms when normal operations resume. If the successful Offeror fails to supplement the notarized forms with notarized copies or if it appears that a form originally submitted was false, then the District reserves the right to rescind any contract before or after award and/or hold the Offeror liable for damages.**

## **G. Receipt and Registration of Proposals.**

Proposals and any addendum shall be registered by the Purchasing Department upon receipt and the PDF saved to a limited access computer file prior to the submission deadline. If an Offeror does not receive an email confirmation that its proposal has been received and registered during normal business hours of 9:00am to 5:00 p.m. on the day the proposal is sent or by **Tuesday, May 11, 2021, at 10:59:99 A.M.**, then Offerors should email or call the purchasing department at (912) 395-5572 to confirm receipt. While the SCCPSS will accept all proposals received by the [purchasing@sccpss.com](mailto:purchasing@sccpss.com) While the SCCPSS will accept all proposals received by the [purchasing@sccpss.com](mailto:purchasing@sccpss.com) email account by 10:59:99 A.M., **Offerors should not wait until the last minute to submit proposals. Any proposals received after 10:59:99 A.M. will be rejected.**

Proposals and modifications shall be shown only to Board personnel having a legitimate interest. Only after award of the contract shall proposals be open to public inspection. If this RFP is cancelled before the award of a contract, the District will retain, but not make open to public inspection, copies of the proposals it received to help preserve the competitiveness of a future solicitation process for the same goods and services.

## **H. Timely-filed, Signed Proposals Considered an Offer.**

An Offeror's timely-filed, signed proposal shall be considered an offer on the part of the Offeror which may become a binding contract on the Offeror if accepted by the Board at the conclusion of the proposal evaluation process. By submitting a proposal in response to this RFP, Offeror agrees that proposal will remain open for acceptance by the Board for at least 120 days without any changes in terms or pricing.

In event that the Offeror refuses to perform its promises made in its offer after acceptance by the Board, the Board may take such action as it deems appropriate to redress the Offeror's failure to perform, including legal action for damages or equitable relief, including specific performance, for the Offeror's lack of required performance.

## **I. Non-Response by Prospective Offerors**

If an Offeror does not wish to submit a proposal in response to this RFP but would like to remain on the list of potential vendors for the SCCPSS, please complete and return only the "No Proposal Statement Form" included with this RFP packet and clearly mark the outside of the envelope with the words "No Response."

**J. Form and Formatting of Proposals.**

The form and formatting requirements for proposals requested by this RFP are described in “Attachment A- Goods and/or Services Requested, Format of Proposals, Evaluation Criteria for Award, and Contract Requirements.”

**K. Bid Bonds.**

A bid bond **IS NOT** required with Offeror’s proposal for this RFP.

If a bid bond is required by this RFP, the requirement are set forth in more detail in “Attachment A- Goods and/or Services Requested, Format of Proposals, Evaluation Criteria for Award, and Contract Requirements,” which is incorporated by this reference.

**L. Performance Bonds.**

A performance bond **IS NOT** required in connection with this RFP.

If a performance bond is required by this RFP, the requirements of any such Performance Bond will be set forth in “Attachment A- Goods and/or Services Requested, Format of Proposals, Evaluation Criteria for Award, and Contract Requirements,” which is incorporated by this reference.

**M. Offeror’s Essential Credentials and Business Structure to be considered a “Responsible Offeror.”**

To be even be considered for a possible award of a contract for the goods and/or services requested by this RFP, an Offeror must be deemed a “responsible” Offeror by the SCCPSS Purchasing Department.

To be considered a “responsible” Offeror for the purpose of this RFP, an Offeror must be licensed and have the capacity to provide the goods and/or perform the services requested by this RFP and must be able to meet the minimum licensing, bonding, insurance, and contractual requirements of this RFP. The Board reserves the right to request an Offeror to provide additional information or documentation to demonstrate that it is a “responsible” Offeror. Failure to provide the requested additional information, in itself, will be sufficient grounds for the Board to declare the Offeror to be not “responsible” for the purposes of this RFP.

To be considered a “responsible” Offeror, the Offeror’s majority (51%) ownership, whether public or private, must be held by citizens or lawful permanent residents of the United States.

To be considered a “responsible” Offeror, the Offeror must attach to its proposal a copy of any and all business licenses needed for the Offeror to provide the requested goods and/or services, including any local business licenses needed to provide the good and/or services requested by this RFP in Chatham County.

If the Offeror is a corporation, a copy of a current Annual Corporate Registration issued by the State in which the Offeror incorporated is required to demonstrate that the Offeror is a “responsible” offeror.

While any lawful form of business may be a “responsible” Offeror, if the Offeror is a partnership or joint venture (PJV), a copy of the contractual agreement between the participants in the PJV must be provided with the PJV’s proposal. The PJV agreement must be adequate to its purpose of establishing a safe and well-structured good faith relationship between the participants, and must comply with all applicable laws, including Antitrust Laws. The agreement must include adequate provisions to address unforeseen events such as the demise of any one of the partners or joint venture companies, and the like.

If a joint venture, information and documentation must be provided to establish whether the joint venture is a business entity created for the purpose of functioning as the joint venture, or whether the joint venture is operated through the existing legal status of the venture partners. All information regarding the legal structure and reporting of income for tax purposes of the PJV must be provided. The District may disqualify from

consideration the Offer of any PJV when it determines such disqualification to be in its best interest.

The District WILL NOT enter into an agreement with more than one legal business entity. Additionally, if two or more projects have not been previously undertaken and successfully completed by a PJV Offeror, each party to the PJV responding to this RFQ must submit complete but separate proposals making clear that it is a part of a PJV Offer. It is required that each participant in a PJV be routinely and on a daily basis in the business of providing services which are closely similar or identical to those Services solicited by this RFP.

**N. Insurance, Warranty, Indemnity Requirements for “Responsible” Offerors.**

To be considered a “responsible” Offeror, all Offerors may be required to meet minimum insurance, warranty, and indemnity requirements set forth in more detail in “Attachment A- Goods and/or Services Requested, Format of Proposals, Evaluation Criteria for Award, and Contract Requirements,” which is incorporated by this reference.

**O. O.C.G.A. § 13-10-91 and E-Verify Compliance Required for “Responsible” Offerors.**

To be considered a “responsible” Offeror, all Offerors are required to comply with O.C.G.A. § 13-10-91, a Georgia statute that prohibits a public employer such as the SCCPSS from entering into any contract with a contractor who fails to participate in the federal work authorization program E-Verify or fails to demonstrate that it is not required to participate in the E-Verify program. In order to be deemed a “responsible” Offeror eligible for this RFP, the Offeror must provide the affidavit(s) or other documentation required O.C.G.A. § 13-10-91. While the District provides sample O.C.G.A. § 13-10-91 affidavit forms in this RFP, Offerors are solely responsible for familiarizing themselves with their obligations under O.C.G.A. § 13-10-91 and making sure that they provide the Board with the required documentation.

***P. Local and/or Minority/Women Business Enterprise (LMWBE) Policies.***

It is the policy of the Board to maximize the utilization of qualified local, minority, and women owned business enterprises (“LMWBEs”) who provide professional services or who serve as prime contractors, subcontractors or suppliers as a part of the District’s facilities construction, maintenance and repair programs. Prime contractors on district construction projects shall make and document good faith efforts to maximize the utilization of qualified LMWBEs as subcontractors and suppliers and provide proof of such efforts and contracts with and payments made to LMWBEs upon request. The Board also promotes capacity building within the local construction community and encourages the use of partnerships, teaming and mentorships to provide LMWBEs with relevant and necessary experiences to grow their business.

For the purposes of this policy, good faith efforts may include, but not be limited to, the following:

- Attend pre-solicitation meetings to inform LMWBEs of subcontracting opportunities.
- Advertise in general circulation media, trade association publications, and minority and women business enterprise media to provide notice of subcontracting opportunities.
- Communicate with the City of Savannah’s Office of Economic Development to identify available and qualified LMWBE firms.
- Review the District’s list of vendors indicating an interest in providing services to the District.
- Select portions of work for subcontracting in areas with established availability of LMWBE subcontractors.
- Solicit and negotiate with available and qualified LMWBEs for specific subcontracting opportunities.
- Assign substantive work to LMWBEs or LMWBE teaming partners.

For the purposes of this policy, a local business enterprise is defined as (1) having established a regular, physical place of business other than a job site office with at least one employee within the geographical boundaries of the Savannah, Georgia Metropolitan Statistical Area (MSA) prior to the closing date on the solicitation (a post office box address will not satisfy this requirement); (2) having a current

Business Tax Certificate and other licenses, certificates, or permits required by law to operate a business in that location; and (3) performing a commercially useful function within the local office.

For the purposes of this policy, a Minority Business Enterprise is an independent, continuing venture that is at least 51% owned by a minority person or persons that meets the criteria for a Disadvantaged Business. A Disadvantaged Business is a small business which is owned, controlled and managed on a daily basis by a majority or persons, not limited to members of minority groups, who have been deprived of the opportunity to develop and maintain a competitive position in the economy because of social disadvantage. This includes:

1. African American: A person with origins in any of the Black racial groups of Africa;
2. Hispanic American: A person with origins from Mexico, South America, Central America or the Caribbean Basin, regardless of race; and
3. Asian American: A person with origins from the Indian subcontinent, countries of the Asian Pacific region, and surrounding countries; and
4. American Indian: A person with origins from the indigenous people of North America.

For the purposes of this policy, a Women Business Enterprise is an independent, continuing venture that is at least 51% owned by one or more women. To qualify as an LMWBE, the owner must be a citizen or lawful permanent resident of the United States, be involved in daily business operations, and provide a commercially useful function. The ownership interest must be real and continuous and not created solely to meet the local/minority/women business or local/minority/women contractor good faith efforts. SCCPSS shall, through their program management and construction management providers, engage in efforts to communicate opportunities afforded by the District's facilities construction, maintenance and repair programs to LMWBEs, including but not limited to:

- Communicate opportunities associated with SCCPSS facilities construction, maintenance and repair programs to the citizens of Chatham County.
- Work with other local governments and relevant community organizations to provide technical assistance and guidance to LMWBEs;
- Develop strategies to assist prime contractors in maximizing their utilization of LMWBEs;
- Develop and provide informational sessions to educate LMWBEs in the requirements of the District's procurement process;
- Provide notices as outlined above and maintain a list of vendors who have provided or are interested in providing services to the SCCPSS, as outlined above.

SCCPSS may, from time to time, audit vendor contracts with and payments to LWMBE contractors and subcontractors and may require that proof of such contracts and payments be provided to the SCCPSS.

All bidders must read, complete and return all of the LMWBE forms attached to this RFP.

**Q. *The Board's Reservation of Rights to Cancel this RFP, to Amend the RFP Process, to Disqualify Offerors, and to Waive Irregularities and Technicalities.***

The Board, in the discretion of the Purchasing Director, the Director of Budgeting Services, the Superintendent, or the Board's governing body, the elected School Board, may cancel this RFP at any time before the Board awards a contract to any Offeror(s). The Board may decline to purchase the goods and/or services solicited in this RFP at all or it may decide to purchase some or all of the same goods and/or services through a similar or different procurement process.

The Board, in the discretion of the Purchasing Director, the Director of Budgeting Services, the Superintendent, or the Board's governing body, the elected School Board, reserves the right to amend this RFP and all attachments in any way and at any time (without cancelling it in its entirety) before the deadline for the submission of proposals. Any addenda amending this RFP will be made available to all Offerors on the SCCPSS website. As stated above, the submission deadline will be extended at least seventy-two (72) hours if any addenda is issued less than seventy-two (72) hours before the submission deadline.

The Board further reserves the right to amend this RFP in any way after the deadline for the submission of proposals (without cancelling the RFP in its entirety), except the Board will not amend the original proposal formatting or submission requirements, the criteria for determining whether the Offeror is a “responsive” or “responsible” Offeror, or any of the initial evaluation criteria used for determining whether the Offeror is “reasonably susceptible of being selected for award” or “short-listed,” phrases commonly used by the Purchasing Department to indicate that an Offeror performed well enough on the initial evaluation criteria to be eligible to participate in interviews or subsequent rounds of evaluations. A non-exclusive example of such an amendment to an RFP may be changes to second round evaluation criteria to help differentiate those short-listed Offerors determined to be “reasonably susceptible of being selected for award.”

The Board further reserves the right to redo any stage of this RFP (without cancelling it in its entirety) if the Board, in the discretion of the Purchasing Director, the Director of Budgeting Services, the Superintendent, or the Board’s governing body, the elected School Board, has concerns that a stage of the RFP should be redone to eliminate any question of whether it was conducted properly. A non-exclusive example of redoing a stage of the RFP is as follows: If the Superintendent has concerns that the impartiality of a member of an interview panel might reasonably be questioned, the Superintendent may direct that all Offerors previously interviewed be interviewed again with a new panel, without canceling the solicitation and restarting the solicitation in its entirety.

The Board reserves the right to reject any and all proposals submitted in response to this RFP, and to waive any irregularities or technicalities in proposals received whenever such rejection or waiver is in the best interest of the Board.

The Board has the right to disqualify a proposal of any Offeror on the basis that the proposal is “nonresponsive” or the Offeror is “not responsible.”

A proposal shall be deemed “nonresponsive” if it fails to include all of the information or documents required by this RFP.

An Offeror shall be deemed “not responsible” if the Board determines that the Offeror fails to meet the minimal requirements to be eligible for consideration, including but not limited to, a lack of capacity to do the work or provide the services requested, a lack of proper insurance, the lack of a valid business license, failure to satisfy e-Verify requirements, being disqualified from working for the SCCPSS because of poor performance on a prior project, or some other reason that gives the Board reason to question the responsibility or reliability of the Offeror. The District reserves the right to request an Offeror to provide additional information in response to any concern that an Offeror may not be a “responsible” Offeror. Failure to provide the requested additional information, in itself, will be sufficient grounds for the Board to declare the Offeror to be not “responsible” for the purposes of this RFP.

## **R. Evaluation and Award of Contract.**

A contract with the Board, if one is awarded at all, for the goods and/or services requested in this RFP will be awarded by means of the evaluation process described in in “Attachment A - Goods and/or Services Requested, Format of Proposals, Evaluation Criteria for Award, and Contract Requirements.”

Depending on the nature of the goods and/or services the Board may provide a sample of the contract it is willing to execute with a successful Offeror. If such a sample contract is attached, then the Offeror is deemed to have agreed that all of the terms contained therein will be acceptable by submitting a proposal. If the Offeror wants to propose materially different terms, then the Offeror should file a request for Material Substitution using the procedure outlined above before submitting its proposal.

For other goods and/or services, the Board may ask Offerors to provide a proposed contract. The terms of that proposed contract will be evaluated as part of the selection process and the District may ask short-listed Offerors determined to be reasonably susceptible for award to negotiate specific terms. The specifications for the goods and/or services requested by this RFP may also include specific contract terms outlined in “Attachment A - Goods and/or Services Requested, Format of Proposals, Evaluation Criteria for Award, and Contract Requirements” that should be included in any contract proposed by an Offeror.



By way of a non-exclusive example, the specifications may provide that the Board will not agree to any contract provision requiring the Board to indemnify any Offeror as such provisions are prohibited by Board policy and state law. Conversely, there may be times when the Board requires an Offeror to maintain certain levels of insurance, to honor certain warranties, or to provide indemnity to the Board.

**S. Consideration of Offeror Past Performance.**

Successful Offerors should be advised that they will be evaluated by the District over the duration of the contract period. Performance will be documented. Poor performance may result in the Offeror being disqualified on future RFPs. Good performance may result in the Offeror receiving additional points on future RFPs.

**T. Public Information.**

It is the policy of the Board that at the conclusion of the selection process, the contents of all proposals will be placed in the public domain and be open to inspection by interested parties. Trade secrets or proprietary information that are recognized as such and are protected by law may be withheld, if clearly identified as such in the proposal. Failure to list all proprietary sections of the submitted proposal shall relieve the Board from any responsibility should such information be viewed by the public, a competitor, or be in any way accidentally released.

**U. Offeror Questions, Requests for Interpretations, and Issuance of Addenda.**

If an Offeror should have any questions relating to an RFP, including but not limited to the interpretation of RFP language, the specifications for the goods and/or services requested, the terms of sample contract provisions attached to this solicitation, the preparation or submission of Proposals, or the evaluation and contract award process outlined in this RFP, the offeror may deliver written requests for interpretation by email to the Purchasing Department's designated email [purchasing@sccpss.com](mailto:purchasing@sccpss.com). Email must contain the **"RFP NUMBER, NAME, AND QUESTION SUBMITTAL"** clearly marked in **UPPER CASE** in the subject line of the submitting email. Question emails without the "RFP Number, Name and Questions Submittal" clearly identified in the subject line of the email may not be considered.

All answers to questions and any interpretations of documents shall be made by addenda to the RFP and shall be made available to all Offerors on the District's website. While the Board will also make a good faith effort to mail or fax any addenda to all Offerors who attended pre-proposal conferences, submitted requests for interpretations to the District, or otherwise communicated an interest to receive notice of addenda, the Board's failure to provide an Offeror with individualized notice of an addenda will not provide an Offeror with grounds to protest the implementation of this RFP. Offerors are ultimately responsible themselves for keeping track of addenda issued by the Board before the deadline for submitting proposals in response to this RFP.

**All requests for interpretation must be submitted to the Purchasing Department before the close of business, 5:00 PM on Thursday, April 29, 2021.** The Board shall not be required to answer any questions about this RFP submitted after 4:59:99 P.M. on this date.

The Purchasing Department will extend the deadline for submitting proposals for all Offerors by at least seventy-two (72) hours if it issues any addenda within seventy-two (72) hours before the scheduled proposal submission deadline.

The Purchasing Director, or her designee, in her discretion, may extend the deadline for submitting requests for interpretation for all Offerors if the deadline for submitting proposals is also extended.

The Purchasing Director, or her designee, are the only individuals authorized by the District to make any representations to any Respondent. All special request and replies, if any, will be circulated to all Respondents who would therefore be entitled to amend their Proposals.

## V. Requests for Material Substitution of Products, Services, or Contract Terms.

The goods and/or services requested by the SCCPSS in this RFP are described in more detail in "Attachment A- Goods and/or Services Requested, Format of Proposals, Evaluation Criteria for Award, and Contract Requirements." which is incorporated into this RFP by this reference.

When reference is made in the specifications as to a particular manufacturer, type of process, brand name, or model number, such references are usually, but not always, made to designate minimum acceptable levels of quality and do not indicate a preference. In some instances, a particular manufacturer, type of process, or brand name is required.

In the event an Offeror would like to propose terms that conflict with the required terms stated in the Attachment A for this RFP, the offeror should request substitution of conflicting terms by the deadline for Requests for Material Substitution. All determinations of the acceptability of the proposed replacement terms shall rest with the Board staff and their decision shall be final.

Offeror may submit additional proposal terms that do not expressly conflict with the minimum required terms set forth in Attachment "A." Such terms will be evaluated by the District.

**The foregoing notwithstanding, the District reserves the right to negotiate any and all terms up until the elected School Board votes to award a final contract as a result of this RFP.**

All requests for the material substitution of good and services and the change of contract terms shall be submitted to the Purchasing Department by email to the Purchasing Department's designated email [purchasing@sccpss.com](mailto:purchasing@sccpss.com). Email must contain the "RFP NUMBER, NAME, AND REQUEST FOR MATERIAL SUBSTITUTION" clearly marked in UPPER CASE in the subject line of the submitting email. Material substitution emails without the "RFP Number, Name and Request for Material Substitution" clearly identified in the subject line of the email may not be considered.

All answers to requests for material substitution shall be made by addenda to the RFP and shall be made available to all Offerors on the District's website. While the Board will also make a good faith effort to mail or fax any addenda to all Offerors who attended pre-proposal conferences, submitted requests for interpretations to the District, or otherwise communicated an interest to receive notice of addenda, the Board's failure to provide an Offeror with individualized notice of an addenda will not provide an Offeror with grounds to protest the implementation of this RFP. Offerors are ultimately responsible themselves for keeping track of addenda issued by the Board before the deadline for submitting proposals in response to this RFP.

**All requests for material substitution must be submitted to the Purchasing Department on or before 5:00 P.M. on Thursday, April 29, 2021.** The Board shall not be required to answer any questions about this RFP submitted after 4:59:99 P.M. on this date.

The Purchasing Department will extend the deadline for submitting proposals for all Offerors by at least seventy-two (72) hours if it issues any addenda within seventy-two (72) hours before the scheduled proposal submission deadline.

The Purchasing Director, or her designee, in her discretion, may extend the deadline for submitting requests for material substitution for all Offerors if the deadline for submitting proposals is also extended.

## W. Protests

Any actual Offeror or bona fide prospective Offeror who is aggrieved in connection with this RFP may protest to the Purchasing Director by email to [purchasing@sccpss.com](mailto:purchasing@sccpss.com). Please include the "RFP NUMBER, NAME, AND PROTEST" clearly marked in UPPER CASE in the subject line of the email. It is incumbent upon the Offeror to receive confirmation from the Purchasing Department that its protest has been received. Offerors who do not receive confirmation of the protest by email during normal business hours of 9:00am to 5:00 p.m. on the day the protest is sent should call the Purchasing Department to confirm receipt of

the protest at (912) 395-5572.

By submitting a Proposal in response to this RFP, the Offeror waives any objection to the content of this RFP (including any attachment or addenda) as well as any objection to any procedure outlined therein. Protests filed after the deadline for submissions shall only concern the implementation of the RFP as applied to the Offeror.

Any protest to the content of this RFP (including any attachment or addenda) as well as any objection to any procedure or evaluation criteria outlined therein shall be filed no later than five (5) business days prior to the deadline for submissions of proposals, unless the objection concerns an addenda issued fewer than five (5) business days prior to the deadline for submissions of proposals, in which case, an objection may be filed to that addenda only at any time before the submission deadline.

Any protest filed after the submission deadline shall be submitted within five business (5) days after the action by the District on which the grievance is based, but in no case later than five business (5) days after the date of the District's notice of intent to award a contract for the provision of goods and/or services requested in his RFP, which will be transmitted by fax to all Offerors.

The Board shall not intentionally withhold information that is stated in this RFP to be forthcoming at certain intervals, but failure of the District to notify an Offeror who might be aggrieved by the content of such notification shall not give rise to any claim or rights resulting from said failure. Only formal protests will be considered, and in order for a protest to be considered as formal, it must be presented in written form, and must contain a minimum of the following:

- A specific identification of the statutory or regulatory provision(s) that the District's purchasing staff member or department is alleged to have violated,
- A specific description of each act alleged to have violated the statutory or regulatory provision(s) identified above,
- A precise statement of the relevant facts that include timelines and all involved parties, and
- An identification of the issue(s) that needs to be resolved that support the protest.

The letter of protest shall be taken under consideration by the Chief Financial Officer and/or the Superintendent, who shall respond to the protesting Offeror within ten (10) business days of receipt of the letter of protest. The initial written response may explain that the Chief Financial Officer and/or the Superintendent need additional time to review the Protest. In any event, a final decision will be issued on the Protest by the Chief Financial Officer and/or the Superintendent before the execution of a final contract with the Successful Offeror. This written decision shall be final and conclusive.

**X. Offerors Not Entitled to Reimbursement for their Costs Associated with Submitting Proposals.**

The Board recognizes that participating in this RFP process, or any government procurement process, can be time consuming and expensive for Offerors. In participating in part of this process, Offerors acknowledge that their costs in participating in this process are the costs of attempting to do business with the SCCPSS.

All Offerors or potential Offerors, including unsuccessful Offerors or Offerors or potential offerors who file protests, agree that the Board shall not be responsible for reimbursing the Offeror for any costs they may incur in connection with this RFP, including staff time, printing costs, attorneys' fees, or expenses of litigation.

**Y. Gratuity Prohibition.**

No Offeror shall offer any gratuities, favors, or anything of monetary value to any official, employee, or agent of the District for the purpose of influencing consideration of this solicitation.

**Z. Certification of Independent Submission of Proposals.**

By submitting a proposal in response to this RFP, the Offeror must certify that:

1. The information in this Statement of Qualifications has been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition with any other Offeror or with any competitor;
2. The information in this Statement of Qualifications has not been knowingly disclosed by the Offeror and will not knowingly be disclosed by the Offeror prior to the District's final determination regarding this RFQ, directly or indirectly to any other Offeror or to any competitor;
3. No attempt has been made or will be made by the Offeror to induce any other person or firm to submit or not to submit a Statement of Qualifications for the purpose of restricting competition; and,
4. In the event the Offeror is a partnership or joint venture, each party thereto certifies the above.

### **III. RFP ATTACHMENTS, SPECIFICATIONS, SAMPLE CONTRACTS, AND FORMS**

The following attachments, specifications, sample contracts and forms are part of this RFP and are herein incorporated by this reference.

- A. Attachment A:** Goods and/or Services Requested, Format of Proposals, Evaluation Criteria for Award, and Contract Requirements.
- B. Attachment B:** Forms to be submitted with this RFP.
  1. Solicitation Form 1: Proposal Submission Checklist  
(to be included on the front of any proposal)
  2. Solicitation Form 2: Proposal Certification Form  
(to be included behind the checklist and before the Offeror's proposal)
  3. Solicitation Form 3: Offerors References (to be included following the Offeror's Proposal)
  4. Solicitation Form 4: Contractor Affidavit Under O.C.G.A. § 13-10-91
  5. Solicitation Form 5: Subcontractor Affidavit Under O.C.G.A. § 13-10-91  
(only needed if subcontractors will be used)
  6. Solicitation Form 6: Sub-Subcontractor Affidavit Under O.C.G.A. § 13-10-91  
(only needed if sub-subcontractors will be used)
  7. Solicitation Form 7: Disclosure of Responsibility Statement
  8. Solicitation Form 8: Documentation of Good Faith Efforts to Involve LMWBE
  9. Solicitation Form 9: Joint-Venture Disclosure Statement  
(only need if a joint venture used)
  10. Solicitation Form 10: Form for Sealed Fee Proposal
  11. Solicitation Form 11: No Proposal Statement Form
- C. Attachment C:** Sample Contract
- D. Attachment D:** Five (5) year loss run report

**Attachment A to RFP #21-52 :**  
**Excess Worker's Compensation Insurance Broker (Annual Contract)**

**Goods and/or Services Requested, Format of Proposals,  
Evaluation Criteria for Award, and Contract Requirements.**

The project specifications listed in this section supersede any contradictory references made in the General Terms and Conditions section of this RFP.

**1.0 General Intent.**

The intent of these specifications is to solicit formal sealed proposals from firms qualified to provide Excess Worker's Compensation Insurance Broker services for the Savannah Chatham County Public School System (SCCPSS). SCCPSS is seeking proposals from experienced, highly qualified, and capable Offerors for Excess Worker's Compensation Insurance .

Offerors responding to this RFP are encouraged to be very specific and detailed in their responses to the following Scope of Work and Specifications. Responses to this RFP will be evaluated for quality, comprehensiveness, experience, and deliverables meeting the following scope of work, specifications and criteria.

**2.0 Background Information.**

The Savannah-Chatham County Public School System currently enrolls approximately 39,000 students in grades Pre-Kindergarten through 12<sup>th</sup> grade and employs more than 5,300 staff members which are assigned to sixty-three (63) work sites. Approximately 3,265 are professional administrators or teachers and the remaining number represents support service employees comprised of custodians, food service workers, maintenance staff, transportation staff, paraprofessionals, secretaries, clerks, and various administrative and other positions. The school district currently has twenty-six (26) elementary schools, nine (9) K-8 schools, nine (9) middle schools, ten (10) high schools, and eleven (11) other educational facilities. The District is in the final construction phase of one (1) additional K-8 school with an estimated completion date of August 2021 and construction of one (1) K-12 school with an estimated completion in 2023. On July 1, 2015, based on the outcome of a similar solicitation, the District awarded an annual contract to Arthur J. Gallagher Risk Management Services with State National Insurance Co, as the insurance carrier to provide Excess Worker's Compensation Insurance Benefits. The current contract will expire on June 30, 2021.

As applicable, the Savannah-Chatham County Public School System relies on the doctrines of public and official immunity as its primary claims defense and is self-insured. It is the District's intent to award a contract to one (1) qualified Service Provider.

**HISTORICAL DATA:**

- A. The name of the District's current insurance carrier is Safety National Casualty Corporation.
- B. The annual projected payroll for the current fiscal year is approximately \$230 million.
- C. The Board will maintain a \$400,000 retention on any resulting policy.
- D. The existing Excess Worker's Compensation Program will expire on June 30, 2021 and coincides with the District's Fiscal Year.
- E. The existing Third-Party Administrator (TPA) contract with Underwriter's Safety & Claims, Inc. of Louisville, Kentucky will expire on June 30, 2021.
- F. The Georgia School Board Association provides loss control services to the District.
- G. The District is fully insured for Worker's Compensation and does everything possible to return employees, with physician's restrictions, to work as soon as possible.
- H. All firms that enter into a contractual agreement with the Board are required to procure and maintain, for the duration of the agreement, the insurance coverages listed on page 24, Section 8.15, herein which includes Worker's Compensation insurance.

- I. Copies of the District's most recent Audited Financial Report and Actuarial Report will be provided to the successful Service Provider (upon request).
- J. A report containing District vehicle and driver information will be provided to the successful Service Provider (upon request).
- K. The District's current plan structure is as follows: Worker's Compensation (Statutory); Employer's Liability (\$1,000,000); Aggregate (N/A); Retention (\$400,000).
- L. The District does utilize volunteer labor.
- M. The District does not have any known occupational disease exposures.
- N. The District does have employees that travel to foreign countries.
- O. The District does store or distribute flammables.
- P. The District does have known operations which expose employees to heights or to burns.
- Q. The District does not have any Safety Incentive Programs.

Provided with this solicitation (in PDF format) is the following report:

1. Loss runs for the past ten (10) year period 7/12/2011 through 03/12/2021

### **3.0 Scope of Services Requested by this RFP.**

Service Provider shall do, perform, and carry out the services as specified below in a satisfactory and proper manner and in conformance with the standard practices and procedures of its profession as the District's Service Provider to provide Insurance Broker Services for Excess Worker's Compensation Insurance. Minimum Scope of Service Requirements will include, but is not limited to:

- A. Successful Service Provider will assist the District's Risk Manager in the analysis of District exposures to loss and adequacy of coverage to develop the most cost-effective risk management solutions.
- B. Successful Service Provider will develop all underwriting data, complete all applications, and prepare specifications for policy renewals.
- C. Thirty (30) days prior to each policy renewal, Service Provider will approach various markets to obtain and verify to the District that they are receiving the best premium rate. Service Provider will submit (in writing) to the Risk Manager a report which identifies the market that were approached; the markets that provided quotes; the quotes provided by each market; which markets declined to quotes; and the reason(s) for any market declination. The District requires that two (2) copies of the report be submitted to the Risk Manager no later than fifteen (15) days prior to expiration date of coverage/policy renewal. **THE DISTRICT RESERVES THE RIGHT TO REQUEST THE SERVICE PROVIDER TO OBTAIN QUOTES AT ANY OTHER TIME DURING THE CONTRACT TERM IF IT IS DEEMED IN ITS BEST INTEREST TO DO SO.**
- D. Successful Service Provider must provide Excess Worker's Compensation Insurance coverage on an annual "fixed fee" basis.
- E. Successful Service Provider must be willing to have his books, account, and records regarding the District to be audited by both internal and external auditors.
- F. Successful Service Provider will process all excess insurance claims in accordance with applicable Georgia Law and the current rules and regulations of the Georgia Insurance Commissioner's Office and the State Board of Worker's Compensation.
- G. Successful Service Provider will submit with seventy-two (72) hours of receipt, all claims to the Excess Worker's Compensation insurance carrier.
- H. Successful Service Provider will perform all reasonable and necessary administrative and clerical work in connection with Excess Worker's Compensation claims and losses.
- I. Successful Service Provider will maintain a file on each Excess Worker's Compensation claim which will become the property of the District and shall be available for review by the District at any reasonable time.

- J. Successful Service Provider will comply with all terms and conditions of the excess insurer(s) in regard to claim reporting requirements.
- K. Successful Service Provider will provide written status and settlement evaluation reports.
- L. Successful Service Provider will periodically evaluate all aspects of the excess insurance program from a “best practices” standpoint and will assist, when requested, in the implementation of the identified “best practices”.
- M. Successful Service Provider will meet with District’s Risk Manager to explain any changes in existing procedures and assist in service implementation.
- N. Successful Service Provider will meet periodically with the District’s Risk Manager to discuss the status of open claims and other related Worker’s Compensation and/or risk management issues.
- O. Successful Service Provider will be required to provide other services that are normally and customarily requested of an Insurance Broker.
- P. Successful Service Provider will file all required reports and statements with the State of Georgia.
- Q. Successful Service Provider will provide 1099 form for vendor services and will forward copy to the Risk Manager.
- R. Successful Service Provider will provide on-line access to excess claim files and reports.
- S. Successful Service Provider will provide at a minimum, the following specific Excess Worker’s Compensation insurance coverages with limits as follows: Worker’s Compensation Limit-Statutory; Employers Liability Limit-\$1,000,000; Self-Insured Retention - \$400,000, Aggregate-N/A. The Savannah-Chatham County Public Schools System shall be named as “insured” on the binder and on all certificates.
- T. Successful Service Provider will provide as required and when requested, meaningful and timely claim reports. All claim detail and transaction information will be recorded and stored electronically with “real time” access by the District.
- U. Special reports and documentation will be provided to the District for any serious case(s) that exceed the policy limits.

#### **4.0 Silence of Specifications.**

The apparent silence of these specifications and any supplemental specifications as to any detail or the omission from the specifications of a detailed description concerning any point shall be regarded as meaning that only the best commercial practices are to prevail and correct type, size and design are to be used. All interpretations of these specifications shall be made on the basis of this statement.

#### **5.0. Evaluation Procedure and Procedure for Award.**

By the proposal submission deadline, Offerors will submit their proposals in response to this RFP. Proposals shall be formatted as described in Section 6.0, Manner of Preparation, Format of Proposals, and Required Forms and Documents, and should be submitted with all of the forms and documents requested. Proposals will initially be reviewed by the Purchasing Department to determine whether the Proposals are “responsive” and the Offerors are “responsible” as described in the General Terms and Conditions of this RFP in light of the goods and/or services requested in this RFP as described more fully in this attachment “A.” If any proposal is determined not to be “responsive,” the Purchasing Department will inform the Offeror in writing that its proposal will not be considered on the basis that it is not “responsive.” If any Offeror is determined by the Purchasing Department to not be “responsible,” the Purchasing Department will inform the Offeror in writing that its proposal will not be considered on the grounds that the Offeror is not a “responsible” bidder.

After determining whether the proposals are “responsive” and the Offerors are “responsible,” the Purchasing Department will evaluate all of the “responsive” proposals from all of the “responsible” Offerors using the evaluation criteria set forth in Section 7.0 below and rank the proposals in order of most desirable to least desirable. The Board may determine that all proposals are good enough to be “reasonably susceptible for award” or it may determine that only a certain number of the highest rank Offerors are “reasonably susceptible of being selected for award” and create a short list of those Offerors that the SCCPSS is most

interested in contracting with.

For this solicitation, the Purchasing Department may decide after ranking the “responsive” proposals from “responsible” Offerors to conduct interviews of all “short-listed” Offerors determined to be “reasonably susceptible of being selected for award.”

If interviews are conducted, each of the firm(s) will be scheduled an interview/presentation time. The interviews will last approximately one (1) hour. There will be no separate evaluation points awarded for interviews/presentations; however, technical evaluation points may be revised based on the information that is presented and/or clarified during the interview process. As a result, the short-listed Offerors may be re-ranked. It will be the sole discretion of the evaluation team to decide if interviews will be required.

After the Purchasing Department completes its ranking, the Superintendent or her designee may enter into negotiations with any of the short-listed firms to negotiate final contract terms, including, but not limited to price, that will be presented to the School Board, the Board’s governing body, for final approval. Neither the Superintendent, her designee, nor the School Board are bound by the Purchasing Department evaluation committee’s ranking, and they may negotiate final contract terms with any of the short-listed Offerors.

The School Board has discretion to accept or reject the Superintendent’s recommendation. If the School Board rejects the Superintendent’s recommendation, the School Board will direct whether it wants to cancel this RFP in its entirety, whether it wants the Superintendent to continue to negotiate with the recommended Offeror, or whether it wants the Superintendent to move on to negotiate with other short-listed offerors.

If the Superintendent or the School Board are unable to reach a final agreement as to the terms of a contract with the any short-listed Offeror, then the Superintendent, or her designee, may proceed to negotiate with the any or all of other short-listed Offerors and so on until an agreement that is acceptable to the School Board is reached or the RFP canceled.

## **6.0 Manner of Preparation, Order of Required Forms and Documents, and Organization of Proposals**

### **6.1. Manner of Preparation.**

All proposals shall be:

- Typewritten or legibly printed in ink and signed by an authorized representative, with all erasures or corrections initialed and dated by the official signing the proposal. ALL SIGNATURE SPACES MUST BE SIGNED. Facsimile, printed, copied or typewritten signatures are not acceptable.
- Submitted in a sealed envelope, which is plainly marked with the RFP number and title, and date and time of proposal closing. If proposal materials require additional envelopes, then all mailing articles must be combined together and marked as described above.
- Proposer will email a copy of their submittal.
- Submitted with the proposal forms included in this RFP in the order provided in Section 6.2 below.

Offerors 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.

### **6.2 Order of Required Forms and Documents.**

For this solicitation, the proposal, forms, and requested documentation should be submitted to the Purchasing Department in the following order to facilitate Purchasing Department review. The total absence of any of these forms or documents will result in the proposal being declared to be “nonresponsive.”



1. Solicitation Form 1: Proposal Submission Checklist
2. Solicitation Form 2: Proposal Certification Form
3. The Offeror's typewritten or printed proposal which shall be organized as provided in Section 7.3 below.
4. Solicitation Form 3: Offerors References (to be included following the Offeror's Proposal)
5. Solicitation Form 4: Contractor Affidavit Under O.C.G.A. § 13-10-91
6. Solicitation Form 5: Subcontractor Affidavit Under O.C.G.A. § 13-10-91  
(submit only if contractor may use subcontractors)
7. Solicitation Form 6: Sub-Subcontractor Affidavit Under O.C.G.A. § 13-10-91  
(submit only if subcontractors may use sub-subcontractors)
8. Solicitation Form 7: Disclosure of Responsibility Statement
9. Solicitation Form 8: Documentation of Good Faith Efforts to Involve LMWBE
10. Solicitation Form 9: Joint-Venture Disclosure Statement  
(submit only if Offeror is a joint venture)
11. Offeror's Certificate of Insurance: Documents showing that Offeror has the minimum insurance requirements required by this solicitation.
12. A copy of the Offeror's Current Business License/Tax Certificate
13. Any State of Georgia licenses required to provide the goods and/or services requested by this RFP.
14. A copy of the Offeror's W-9, showing its Federal Tax Id. Number and Certification
15. Fee Proposal (Solicitation Form 10, which is to be submitted electronically as a separate PDF file labeled "Fee Proposal").

### 6.3 Organization of Proposals.

Offerors' typewritten or legibly printed proposals shall be organized and tabbed as follows to track the evaluation criteria that will be used by the Board to evaluate proposals:

#### a. Executive Summary (Tab Section A) – Not Scored

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 RFP.

#### b. Business Profile (Tab Section B) – Total Possible Points 10

Describe in this Section, the business organization, who will serve as major project participants, and their respective roles.

1. **Business Organization:** Provide a brief description of the firm, its history, and a statement which describes the firms' experience in providing Insurance Broker Services . Provide the full name, address, telephone number, fax number, email address for the firm and/or subordinate firm that will perform or assist in performing the services described herein. Identify any applicable certifications and/or accreditations that your firm may have and include copies of each in your proposal. State if the firm has operated under a different name within the past ten (10) years. If so, state the name of the firm previously operated under.
2. **Structure:** Discuss the ownership and organizational structure of your company and its staff qualifications and customer services.
3. **Account Representation/Project Team Qualifications:** Identify the proposed project team, with the names and titles of the key individuals. Include a narrative for each team member which describes their qualifications, education, and experience. Provide an organizational chart (in block form) which includes key personnel that will be assigned to a resulting contract. Include resume/credentials for each representative and state how long they have been with your firm. Highlight key and relevant experience.

4. **Customer Service:** Identify who will serve as the District's primary account representative and the name, address and phone number for whom all contract related correspondence will be forwarded.
5. **Office/Service Location:** State the name, location(s), address, phone number, fax number, and email address of the Office/Service Center that will be handling all ESPLOST Performance Audit Services.
6. **Organizational Changes:** State what changes have occurred in the firm over the past six (6) months in regard to staff, organizational structure, capitol, etc., and any reason for the changes. Also state any additional changes that the firm will implement over the next six (6) months.
7. **Agreement Terminations:** Describe complete details of any contract that has not been renewed or has been terminated with your firm within the past five (5) years. State the reason(s) for the termination or non-renewal.

**c. Experience and Capability (Tab Section C) – Total Possible Points 20**

In this section, describe the firm's experience in providing Insurance Broker Services and its capability to meet the District's goals. State the number of years of experience in providing Insurance Broker Services to organizations or entities of similar size, scope and type. Discuss your firm's qualifications and indicate the number of years that the firm has been providing Insurance Broker Services. Discuss your firm's qualifications to include:

1. **Experience:** Describe your firm's specialized experience in providing Insurance Broker Services to educational, government or municipal agencies (preferable within the Southeast region of the State of Georgia) or to private companies with scope of service requirements that are similar to or the same as that requested by the District.
2. **Marketing Capability:** Describe your firm's ability to access, utilize and leverage your market preferences and other key insurance markets and provide the premium value with each.
3. **Financial Capability:** Provide documentation that will allow the District to determine that your firm has sufficient resources and the financial stability to perform the services requested. Approved documentation includes copies of the firm's Annual Audited Financial Reports and/or irrevocable letters of credit. This information shall remain confidential and will not be made part of the public record. **Audited financial reports should be emailed as a separate file labeled "CONFIDENTIAL – Financials". Do not include confidential audited financial reports within your proposal.**
4. **Client References:** Provide a list of five (5) current or past educational clients that your firm has provided Insurance Broker Services to within the past five (5) years of similar size and scope. Include a brief description of the type of services provided to each, date of services, how long reference has been a client of the firm, client name, and phone and fax number and email address. The District reserves the right to contact any reference provided.
5. **Litigation History:** Provide details of any federal, state or local government regulatory investigations, findings, actions, or complaints that your firm and/or organization affiliated with your firm has received within the past three (3) years. If the issue(s) has been resolved, state the corrective action taken.
6. **Current Service Commitments/Responsibilities:** State what existing contractual agreements that your firm currently has and identify the responsibilities and time (%) that each proposed team member will need to dedicate to those agreements.

**d. Project Understanding and Methodology (Tab Section D) – Total Possible Points 30**

In this section, discuss (in summary form) the firm's understanding of the Scope of Services requested to include:

1. **Compliance with Specifications/Scope of Service Requirements:** Provide a written narrative which describes how your firm will comply with the specifications and Scope of Services and emphasize your firm's knowledge and experience in structuring and marketing excess insurance programs for governmental or municipal self-insured programs.
2. **Exceptions:** If there are any exceptions to the specifications, please explain what they are any why they exist.
3. **District Responsibilities:** Describe in detail, what assistance will be required by District staff for your firm to comply with the Scope of Service requirements described herein.
4. **Limitations to Services:** Describe any limitations that your firm may have in providing the services requested herein.
5. **Transition/Implementation Plan:** Describe your firm's methodology and approach to guarantee a successful and smooth implementation/transition of services by July 1, 2021.
6. **Additional Services:** Describe in detail any added value, additional services, or benefits available and offered to the Savannah-Chatham County Public School System, at no additional cost, upon the award of a contract.
7. **"Best Practices":** Describe your firms' service standards and guidelines and your interpretation of "Best Practices".
8. **Impact on Services:** Discuss what impact a resulting contract with the District will have on existing company service accounts.
9. **Computer Support and Report Capability:** Describe your firm's computer support and ability to provide claim reporting in various formats. Attach copies of sample claim report, showing formats in tabbed Section F (Schedules and Attachments)

**e. Other Relevant Facts/Information (Tab Section E) – Total Possible Points 5**

In this section, provide the key reasons why you believe that your firm should be selected by the District to be its Excess Worker's Compensation Insurance Broker . Emphasize qualities and traits that make the firm unique, or give it special advantage over other proposing firms. Attach any supplemental documentation that you believe is relevant.

**6.4 Preparation of Fee Proposals- Total Possible Points 35**

The fee proposals from the firms will be opened and evaluated. After the initial review of all fee proposals, the District may request that all "short-listed" Offerors determined "to be reasonably susceptible for award" resubmit revised Fee Proposals with their "Best and Final Offers". Proposers will state the basis for their fee on the Fee Proposal form provided below. Please note: All fees must be submitted in the format of and on the Fee Proposal form below.

**\*\* The fee proposal shall be submitted electronically as a separate PDF file labeled "FEE PROPOSAL".**

**\*\* NO FEES OR COSTS SHALL BE STATED IN THE TECHNICAL PROPOSAL PACKAGE.**

**7.0 Evaluation Criteria**

For this solicitation, Proposals will initially be evaluated using the following Evaluation Matrix by a panel of District staff or outside consultants unaffiliated with any bidder engaged by the SCCPSS for the purpose of

evaluating proposals. For this solicitation, the following Evaluation Matrix will be used.

Evaluation Criteria	Available Points
<b>Business Profile (Tab Section B)</b>	10
<b>Experience and Capability (Tab Section C)</b>	20
<b>Project Understanding and Methodology (Tab Section D)</b>	30
<b>Other Relevant Facts/Information (Tab Section E)</b>	5
<b>Fee Proposal</b>	35
<b>Total Points</b>	100

This evaluation criteria will be used by the Purchasing Department to determine short-listed offerors and to provide guidance to the Superintendent, her designees, or the Board. However, neither the Superintendent, her designees, nor the Board are bound by this evaluation criteria when negotiating a final contract with any short-listed Offeror, and they may decide not to award a contract to any Offeror.

## 8.0 Terms of Contract.

While the District reserves the right to negotiate any and all contract terms for any future contract, Offeror agrees that it would enter into future contract substantially similar to the attached sample contract, and the District may reject any proposed contract that is not substantially similar, in the District's sole discretion, to the proposed Sample Contract. Any Offeror seeking to propose materially different terms, should submit them to the District by the deadline for requests for interpretation and material substitution, **5:00 PM on Thursday, April 29, 2021.**

## 8.1 Minimum Qualifications

All firms submitting proposals must meet, at a minimum, the following qualification requirements. Failure to meet these qualifications will result in proposal being deemed as "non-responsive".

- A. Proposer must be an organization existing for the primary purpose of providing Insurance Broker Services.
- B. Proposer must have a minimum of five (5) continuous years prior experience in providing Insurance Broker Services to educational, governmental or municipal agencies (preferably located within the Southeast Region of the State of Georgia) with scope of service requirements that are similar to or the same as that requested by the District.
- C. All underwriters proposed must have a current A.M. Best rating of A: or higher. Evidence of rating must be submitted with Proposer's submittal.
- D. Proposer must be authorized and licensed by the State of Georgia Department of Insurance to provide Insurance Broker Services.
- E. Proposer must have an office that is staffed with a minimum of one (1) full-time representative during the hours of 8:00 A.M. and 5:00 P.M., Monday through Friday.
- F. Proposer must have access to Surplus and Excess Lines Carriers.
- G. Proposer must demonstrate a willingness to partner with the District's Risk Manager to maintain a viable, cost effective Excess Worker's Compensation Insurance Program, which includes but is not limited to a change in underwriter at time of policy renewal with a reduction and/or increase in annual premium cost that will be passed on the District, upon approval, in the form of a "deductive" or "additive" change order to the contract. **THE DISTRICT RESERVES THE RIGHT TO REQUEST THE SERVICE PROVIDER TO OBTAIN MARKET QUOTES AT ANY OTHER TIME DURING THE CONTRACT TERM IF IT IS DEEMED IN ITS BEST INTEREST TO DO SO.**

**End of Attachment A  
Forms to Follow**

**BOARD OF PUBLIC EDUCATION FOR THE CITY OF SAVANNAH AND  
THE COUNTY OF CHATHAM  
RFP #21-52 - SOLICITATION FORM 1  
Proposal Submission Checklist**

Please include this Proposal Submission Checklist on the front of your proposal and check which documents are included.

- Solicitation Form 1: Proposal Submission Checklist
- Solicitation Form 2: Proposal Certification Form
- The Proposal: The Offeror's typewritten or printed proposal which shall be organized as provided in Section 7.3 of Attachment "A."
- Solicitation Form 3: Offerors References (to be included following the Offeror's Proposal)
- Solicitation Form 4: Contractor Affidavit Under O.C.G.A. § 13-10-91
- Solicitation Form 5: Subcontractor Affidavit Under O.C.G.A. § 13-10-91 (submit only if contractor may use subcontractors)
- Solicitation Form 6: Sub-Subcontractor Affidavit Under O.C.G.A. § 13-10-91 (submit only if subcontractors may use sub-subcontractors)
- Solicitation Form 7: Disclosure of Responsibility Statement
- Solicitation Form 8: Documentation of Good Faith Efforts to Involve LMWBE
- Solicitation Form 9: Joint-Venture Disclosure Statement (submit only if Offeror is a joint venture)
- Offeror's Certificate of Insurance: Documents showing that Offeror has or can obtain the minimum insurance required by this solicitation.
- A copy of the Offeror's Current Business License/Tax Certificate
- Any State of Georgia licenses required to provide the goods and/or services requested by this RFP.
- A copy of the Offeror's W-9, showing its Federal Tax Id. Number and Certification
- Additional Documents Submitted by Offeror in Support of its proposal
- Fee Proposal (Solicitation Form 10), which is to be submitted electronically as a separate PDF file labeled "Fee Proposal").
- Financial Information, which is to be submitted electronically as a separate PDF file labeled "CONFIDENTIAL – Financials".
- Sample Contract document/Service Agreement
- Copy of proposed implementation plan/outline and estimated deliverable schedule (based on a Notice to Proceed date of July 1, 2021.

If the Offeror does not wish to submit a proposal for this RFP but would wish to remain on the Board's list of interested Offerors, **Please** submit only Form 11 electronically as a separate PDF file labeled "No Response."

**BOARD OF PUBLIC EDUCATION FOR THE CITY OF SAVANNAH AND  
THE COUNTY OF CHATHAM**

**RFP #21-52 - SOLICITATION FORM 2**

**Proposal Certification Form**

Please complete this form and sign it in the presence of a notary:

**A. Local and/or Minority/Woman Business Enterprise Development Information.**

It is the desire of the District to maximize participation of local and disadvantaged business enterprises at all levels in the procurement process. In order to accurately document participation, businesses submitting bids, proposals or Statements of Qualifications are required to report ownership status.

- |   |                                    |  |
|---|------------------------------------|--|
| <input type="checkbox"/> Local            | <input type="checkbox"/> Woman     | <input type="checkbox"/> Asian-American  |
| <input type="checkbox"/> African-American | <input type="checkbox"/> Hispanic  | <input type="checkbox"/> American Indian |
| <input type="checkbox"/> Majority         | <input type="checkbox"/> Non-Local |  |

**B. How Did You Hear About This RFP?** (This information is for statistical use only.)

- |  |  |
|--|--|
| <input type="checkbox"/> City of Savannah, Dept. of Economic Development | <input type="checkbox"/> The Herald Legal Ad           |
| <input type="checkbox"/> Received Request by Mail                        | <input type="checkbox"/> The Savannah Tribune Legal Ad |
| <input type="checkbox"/> Visiting the Purchasing Office                  | <input type="checkbox"/> Savannah News Press Legal Ad  |

**C. Offeror's Certification.**

This is to certify that I, on behalf of the undersigned Offeror, have read this RFP in its entirety (including all attachments) and agree to be bound by the provisions of the contained herein.

This \_\_\_\_ day of \_\_\_\_\_ 20 \_\_\_\_ By: \_\_\_\_\_  
*Name (printed)*

\_\_\_\_\_  
*Title* *Signature*

\_\_\_\_\_  
*Company*

\_\_\_\_\_  
*Address (Street, City, State, Zip)*

\_\_\_\_\_  
*Phone No.* *Fax No.*

\_\_\_\_\_  
*Federal Taxpayer I.D. No.* *e-Verify No.*

\_\_\_\_\_  
*Contact Person for This Bid* *Phone Number*

Acknowledge Receipt of Addendum(s) #\_\_\_\_#\_\_\_\_ #\_\_\_\_#\_\_\_\_ #\_\_\_\_#\_\_\_\_

**D. NOTARY:**

Subscribed and sworn before me on  
This the \_\_\_\_ day of \_\_\_\_\_, 2020

\_\_\_\_\_  
*Notary public*

\_\_\_\_\_  
*My commission expires*

**BOARD OF PUBLIC EDUCATION FOR THE CITY OF SAVANNAH AND  
THE COUNTY OF CHATHAM  
RFP #21-52 - SOLICITATION FORM 3**

**REFERENCES OF AT LEAST FIVE (5) ORGANIZATIONS SUPPLIED WITH SIMILAR ITEMS:**

1 Company Name:

\_\_\_\_\_

Contact Person:

\_\_\_\_\_

Phone Number: \_\_\_\_\_ FAX Number: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

2 Company Name:

\_\_\_\_\_

Contact Person:

\_\_\_\_\_

Phone Number: \_\_\_\_\_ FAX Number: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

3 Company Name:

\_\_\_\_\_

Contact Person:

\_\_\_\_\_

Phone Number: \_\_\_\_\_ FAX Number: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

4 Company Name:

\_\_\_\_\_

Contact Person:

\_\_\_\_\_

Phone Number: \_\_\_\_\_ FAX Number: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

5 Company Name:

\_\_\_\_\_

Contact Person:

\_\_\_\_\_

Phone Number: \_\_\_\_\_ FAX Number: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**BOARD OF PUBLIC EDUCATION FOR THE CITY OF SAVANNAH AND  
THE COUNTY OF CHATHAM**

**RFP #21-52 - SOLICITATION FORM 4**

**Contractor Affidavit Required by O.C.G.A. § 13-10-91(b)**

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 Savannah-Chatham County Public School System 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, if awarded a contract, 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*

**RFP #21-52 Excess Worker's Compensation Insurance Broker (Annual Contract)**

*Name of Project*

**The Board of Public Education for the City of Savannah and the County of Chatham**

*Name of Public Employer*

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

\_\_\_\_\_, 201\_\_\_\_\_ in \_\_\_\_\_, and \_\_\_\_\_  
*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*



**BOARD OF PUBLIC EDUCATION FOR THE CITY OF SAVANNAH AND THE COUNTY OF CHATHAM**

**RFP #21-52 - SOLICITATION FORM 5**  
(Required only if the Offeror may use subcontractors)

**Subcontractor Affidavit Required by O.C.G.A. § 13-10-91(b)**

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 \_\_\_\_\_ on behalf of the Savannah-Chatham County Public School System ("SCCPSS") 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, if awarded a contract, 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 business days of receipt. If the undersigned subcontractor receives notice that a sub-subcontractor has received an affidavit from any other contracted sub-subcontractor, the undersigned subcontractor must forward, within five business days of receipt, a copy of the 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*

**RFP #21-52 Excess Worker’s Compensation Insurance Broker (Annual Contract)**

\_\_\_\_\_ *Name of Project*

**Savannah-Chatham County Public School System**

\_\_\_\_\_ *Name of Public Employer*

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

\_\_\_\_\_ in \_\_\_\_\_, and \_\_\_\_\_  
*Date*                      *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*

**BOARD OF PUBLIC EDUCATION FOR THE CITY OF SAVANNAH AND THE COUNTY OF CHATHAM**

**RFP #21-52 - SOLICITATION FORM 6**  
(Required only if the Offeror may use subcontractors)

**Sub-Subcontractor Affidavit Required by O.C.G.A. § 13-10-91(b)**

By executing this affidavit, the undersigned sub-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 \_\_\_\_\_ (prime contractor) and \_\_\_\_\_ (subcontractor) on behalf of the Savannah-Chatham County Public School System ("SCCPSS") 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 sub-subcontractor will continue to use the federal work authorization program throughout the contract period, if awarded a contract, and the undersigned sub-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 sub-subcontractor will forward notice of the receipt of an affidavit from a sub-subcontractor to the contractor within five business days of receipt. If the undersigned sub-subcontractor receives notice that a sub-subcontractor has received an affidavit from any other contracted sub-subcontractor, the undersigned subcontractor must forward, within five business days of receipt, a copy of the notice to the contractor. Sub-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 Sub-Subcontractor*

**RFP #21-52 Excess Worker's Compensation Insurance Broker (Annual Contract)**

*Name of Project*

**Savannah-Chatham County Public School System**

*Name of Public Employer*

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

\_\_\_\_\_ in \_\_\_\_\_, and \_\_\_\_\_  
*Date 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*

**BOARD OF PUBLIC EDUCATION FOR THE CITY OF SAVANNAH AND THE COUNTY OF CHATHAM**

**RFP #21-52 - SOLICITATION FORM 7**

**Disclosure of Responsibility Statement**

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 of subcontract, or in the performance of such contract or subcontract.
2. List any 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 affect the responsibility of the contractor. List any convictions or civil judgments under state or federal antitrust statutes.
3. List any convictions or civil judgments under state 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 government agency.
6. List any contracts not completed on time.
7. List any penalties imposed for time delays and/or quality of material and workmanship.
8. List any documented violations of federal or state labor laws, regulations, or standards, occupational safety and health rules.
9. List any pending civil actions against company for nonperformance of contract.

I, \_\_\_\_\_, of

\_\_\_\_\_  
*Name of Individual Title & Authority*

\_\_\_\_\_  
*Company Name*

declare under oath that the above statements, including any supplemental responses attached hereto, are true.

\_\_\_\_\_  
*Signature*

\_\_\_\_\_ in \_\_\_\_\_, and \_\_\_\_\_  
*Date City State*

Subscribed and sworn before me on  
This the \_\_\_\_\_ day of \_\_\_\_\_,  
201\_\_\_\_\_

\_\_\_\_\_  
*Notary Public*

\_\_\_\_\_  
*My commission expires*

**BOARD OF PUBLIC EDUCATION FOR THE CITY OF SAVANNAH AND THE COUNTY OF CHATHAM**

**RFP #21-52 - SOLICITATION FORM 8**

**Good Faith Efforts Requirements**

Offerors are required to submit with their proposal evidence of good faith efforts utilized to ensure that minority and women enterprises are provided with the maximum opportunity of compete on this contract. Such good faith efforts of a bidder will include, but not limited to, the following:

Attendance at pre-bid meetings, if any scheduled to inform LMWBE's of subcontracting opportunities.	<input type="checkbox"/> Yes or <input type="checkbox"/> No If no, please explain:
Advertisements in general circulation media, trade association publications, and minority and women business enterprise media to provide notice of subcontracting opportunities.	<input type="checkbox"/> Yes or <input type="checkbox"/> No
Efforts made to select portions of work for subcontracting in areas with established availability of LMWBE subcontractors.	<input type="checkbox"/> Yes or <input type="checkbox"/> No
Providing a minimum of five (5) days written notice to known qualified LMWBEs that their interest in prime and subcontracting opportunities or furnishing supplies is solicited.	<input type="checkbox"/> Yes or <input type="checkbox"/> No
Efforts to negotiate with qualified LMWBEs for specific sub-bids, including reasons for rejections of any sub-bid offered.	Please explain efforts:

**Solicitation Form 8**

**BOARD OF PUBLIC EDUCATION FOR THE CITY OF SAVANNAH AND THE COUNTY OF CHATHAM**

**RFP #21-52 - SOLICITATION FORM 9**

**Joint-Venture Disclosure Statement**  
(only needed if Offeror is a joint venture)

NAME OF OFFEROR: \_\_\_\_\_ **RFP #: 21-52**

If the prime offeror is a joint venture, please describe below the nature of the joint venture and level of work and financial participation to be provided by the LMWBE joint venture firm.

<b>Joint venture firms</b>	<b>Level of work</b>	<b>Financial participation</b>

**Solicitation Form 9**

**BOARD OF PUBLIC EDUCATION FOR THE CITY OF SAVANNAH AND THE COUNTY OF CHATHAM**  
**RFP #21-52 - SOLICITATION FORM 10**  
**Sealed Fee Proposal Form**

(to be submitted with Offeror’s proposal as a separate PDF file labeled “Fee Proposal“)

**\*\* Price is “all inclusive” for turn-key services and includes all labor, materials, site visits, reporting requirements, all overhead, licensing, permitting, insurance, gasoline, freight (as applicable), mileage, per diem, travel time, fuel surcharges, etc. Service Provider will only be compensated for actual services provided during any annual performance period. Absolutely no increases in any type of fee will be honored for the initial one-year term of the contract or during the renewal options for years 2 and 3 unless stated in Fee Proposal.**

**INSURANCE BROKER SERVICES FOR EXCESS WORKER’S COMPENSATION INSURANCE SERVICES:**

Agent shall provide details on its proposed commission or fee structure that would apply for whatever the actual annual insurance premium would be and provide what that total fee would be based using an estimated annual premium of \$135,000.00.

Proposed Commission and/or Administrative Fee Structure	Estimated Annual Insurance Premium	Total Fee Based on Estimated Annual Premium
	\$135,000.00	

In submitting this proposal, I agree to the following:

1. To hold my proposal and all fees valid for a period of one-hundred twenty (120) days.
2. To enter into and execute a contract, if awarded on the basis of this proposal.
3. To accomplish the work in accordance with the contract documents and specifications.
4. To complete the work by the time as listed in the specifications section of this document.
5. I will deliver and complete the services outlined in the solicitation documents.

The undersigned, having read and examined the documents and Attachment “A” specifications, understands the requirements of this proposal and agrees to provide the required services in accordance with this proposal, and all other attachments, exhibits, etc. and further understands that the Savannah/Chatham County Public School System will not be responsible for any cost not specifically set forth in this proposal.

Individual Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Firm Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

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

**Solicitation Form 10**

**BOARD OF PUBLIC EDUCATION FOR THE CITY OF SAVANNAH AND THE COUNTY OF CHATHAM**  
**RFP #21-52 - SOLICITATION FORM 11**

**No Proposal Statement Form**

In an effort to make the procurement of goods and services for the School District as competitive as possible, we are soliciting information from contractors and/or vendors who cannot bid. Your responsiveness and constructive comments will be appreciated.

Completion of this form will assist us in evaluating factors which relate to the competitiveness of our bids. Please check any of the boxes below which may apply. Please explain any issues that you feel needs to be addressed.

- Specifications- Restrictive, too "tight", unclear, specialty item, geared toward one (1) brand or manufacturer only. **(Please explain in detail below).**
- Manufacturing- Unique item, production time for model has expired, etc.
- Bid Time- Insufficient time to properly respond to bid or proposal.
- Delivery Time- Specified delivery time cannot be met.
- Payment - Payment terms unacceptable. **(Please be specific)**
- Bonding - We are unable to meet bonding requirements.
- Insurance - We are unable to meet insurance requirements.
- Removal - Remove our firm from your bidders list for the particular commodity or service.
- Keep - Please keep our company on your bidders list for future reference.
- Project is:\_\_\_/ Too Large \_\_\_\_/ Too Small \_\_\_\_/ Site or Location is Too Distant
- Miscellaneous - Do not wish to bid, do not handle this type of item(s) or services, unable to compete, Contract clauses are unacceptable, etc. **(Please be specific)**

**VENDOR STATEMENT:**

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**CONSTRUCTION PROJECTS ONLY:** Our Company is interested in this project as a:

- Prime Contractor       Sub-Contractor       Supplier/Distributor

\_\_\_\_\_  
Signature/Title

\_\_\_\_\_  
Company Name

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

**SOLICITATION FORM 11**