2.0 Description of Project

The City of Savannah is now accepting proposals for a cemetery management software solution to be used by the Cemeteries Department for tracking and managing various cemetery records and transactions, while providing customers with online and mobile access of cemetery interment records.

The purpose of this request for proposal is to explore a cemetery management software solution capable of streamlining current cemetery processes, thereby improving cemetery record keeping and the customer service experience.

Electronic submissions will not be accepted.

The objectives of this project include, but are not limited to:

- Reduce data and process redundancy
- Safeguard vital records using digital technology
- Provide multiple departmental users on or off-site access to cemetery records
- To provide the public with a mobile and user-friendly interface to locate graves and conduct online burial searches
- Track and manage cemetery inventory in real-time

The City of Savannah’s Cemeteries Department manages five (5) cemeteries consisting of approximately 361 acres. Currently, there are nearly 175,000 records in the existing database, including interments and lot owners. The breakdown for each cemetery is as follows:

1) Bonaventure Cemetery
   a. Approximately 100 acres
   b. 28,612 interments
   c. 11,380 owners

2) Colonial Park Cemetery
   a. Approximately 6 acres
   b. 820 interments
   c. 704 owners

3) Greenwich Cemetery
   a. Approximately 65 acres
b. 11,926 interments  
c. 10,672 owners  

4) Laurel Grove North Cemetery  
a. Approximately 67 acres  
b. 34,619 interments  
c. 4,646 owners  

5) Laurel Grove South Cemetery  
a. Approximately 90 acres  
b. 54,283 interments  
c. 3,836 owners  

6) Unknown locations  
13,471 interments  

The Cemeteries Department uses a system consisting of typewriters, carbon-copy paper, and a database with limited functionality and support. The original database was created using Paradox and later recreated using ASP.NET/SQL. The application is used to track lot and space assignments, customers, and interment information with no direct integration with the City’s financial /accounting system or electronic payment processing or geographic information system (GIS) mapping. The current interment and lot sale processes typically involve multiple staff members. Depending on the transaction, data is often duplicated on up to eight (8) separate documents. The current database does not have the ability to track and manage inventory, requiring all inventory to be manually updated using spreadsheets. Accounts receivables must be tracked on a spreadsheet. All statistics and reports must be generated manually by extracting information from a series of MS Word and Excel reports. Ultimately, the goal of the new management software would be to streamline these processes.  

The City’s current technology environment and standards include the following:  
- Note: The City employs VMware 5.5 for virtual servers  
- Client Operating Systems: Microsoft Windows 2007  
- Database Software: Microsoft SQL Server 2008/2012  
- Web Server Software: Microsoft IIS V 6 / V 7.5.7600.16385  
- Web Browser: Microsoft Internet Explorer 8.0 /9.0/10/11  
- Mail Server Software: Microsoft Exchange Version 14.03.0224.002  
- GIS Software: ESRI ArcGIS 10.x  
- Office Applications: Microsoft Office 2010  
- PC configuration:  
  - HP ProDesk 600 G1  
  - i5 4590 processor  
  - 4GB RAM;  
  - 500GB hard drive;  
  - 512MB video card
2.1 Scope of Services

The successful proposer shall provide a cemetery management software solution that includes the following services:

- Relational database with graphical user interface
- Data migration
- Multi-user environment with multiple tiers of user access
- Ability to track and manage multiple cemeteries
- Cloud-based (preferred) or on-premise software
- Customizable management dashboard
- Ability to create customizable modules
- Audit trail and logging
- Canned and ad-hoc reporting with downloading and printing capabilities
- Documentation of interments
- Tracking of lot sales (with variable price structures based on cemetery and location within the cemetery)
- Ability to generate and print deeds, interment orders, lot cards, deceased cards, and owner cards
- Scheduling of interments and other events, including tracking assigned staff member(s)
- Mapping of cemeteries (must integrate with ESRI ArcGIS)
- Ability to print detailed maps of cemeteries and lots
- Ability to map structures to include, but not limited to, monuments, benches, fountains, and trees
- Tracking maintenance activities (including work orders)
- Attachment of uploaded documents to lots and interment records
- Ability to transfer lot ownership within and between cemeteries
- Ability to track changes in lot ownership in real-time
- Ability to track and search ownership by individuals of multiple lots
- Ability to track and manage A/R with option to export data to printable reports or other software
- Generation and printing of invoices and receipts
- Ability to provide internet access of selected historical records for genealogical research
- Mobile navigation to any gravesite
- Field access for staff to the application via mobile devices
- Kiosk compatibility

2.2 System Configuration: The successful proposer will be responsible for all system configuration needed for implementation of the system. The system must provide all functional requirements as defined in Section III.

2.3 Data Conversion: The successful proposer will be responsible for converting and importing the existing data in the current SQL database to the new format—approximately 175,000 records.
2.4 **Data Integration:** The selected cemetery management software solution shall have the ability to integrate with ESRI ArcGIS.

2.5 **Project Management:** The project manager assigned to this project should have successfully completed a minimum of three (3) implementations of similar scope. Client references for the project manager should be provided. Project status meetings shall be held at an agreed location upon schedule. The project manager is responsible for generating reports to include issues/concerns and percent complete status. The project manager can facilitate these meetings either through conference calls or on-site.

2.6 **Implementation Schedule and Timeline:** A project schedule and implementation timeline should be provided. The schedule should incorporate all aspects of the project implementation. The final schedule and timeline will be defined by the City and the selected vendor once the project has been awarded.

2.7 **Licensing:** Licensing must be provided for a minimum of seven (7) concurrent users. License pricing structure must be included in the Costs section of the proposal.

2.8 **Training:** The City of Savannah requires initial on-site training for the system administrator(s), cemetery personnel, and any other City-designated key end-users. Additional follow-up training shall be scheduled three (3) months after implementation. Describe what training materials are utilized and what documentation is provided with the system. Itemize all system administrator and end-user training recommended to use the system.

2.9 **Maintenance:** Proposers shall include a detailed description of available maintenance options and their related costs.

2.10 **Technical Support:** Proposer shall provide a description of available technical support options and costs, including available hours, and access.

2.11 **Upgrades:** The proposed shall provide a thorough explanation of software upgrades. This must include detail of annual support costs; any additional costs for major upgrades as well the process of testing and training staff on new software versions.

2.12 **Data Management/Storage Capabilities:** The proposed shall provide a best practices guideline for data storage, data retention, and data recovery. Any applicable data storage limits and/or variable costs shall be explained.

2.13 **References:** Proposers shall provide a minimum of three (3) references that are using the proposed system. References should be operating a similar size and type organization (i.e. municipal cemetery management office). See Attachment 1. Provide contact names and phone numbers for the person(s) responsible for the operation of the systems.

2.14 **Qualifications:** The proposer shall demonstrate its knowledge and experience in providing the solutions and/or services listed above in the response. The proposer must have experience in providing solutions for a municipal cemetery management office.
2.15 **Demonstrations:** The proposer must be available to provide an on-site demonstration of the proposed system at the City’s request.

2.16 **Costs:** Detail all cost items for software, implementation costs, and training. Include line item costs for any required hardware and all software. Define licensing structure and costs. The first year's maintenance and support should be included in the initial cost. Also include second year through five (5) year costs that may be required for maintenance, upgrades, etc.

2.17 **Proposal Format:** Proposals shall be submitted in the following format and include the following information:

- Statement of the consultant’s qualifications and list of similar projects performed by each consultant. See Attachment 2. This document must be included for response to be further considered.
- List of project references.
- Response to functional requirements list.
- Fee proposals per instructions in Section IV signed by responsible party
- Proposed Schedule of Minority and Women owned Business Participation and Non-Discrimination Statement.
- Other submittals as states

2.18 **Basis of Award**

Proposals will be evaluated according to the following criteria and weight:

a) Proposer’s qualifications and experience in similar organizations, such as municipal or private cemeteries, including support capabilities (30 points)
b) Software capabilities; ability to meet functional requirements (20 points)
c) Fees, including the cost of training, maintenance, and support (25 points)
d) References (10 points)
e) MWBE participation goals (10 points)
f) Local vendor participation (Within the City Limits of Savannah and has a City of Savannah Business Tax Certificate) (5 points)

Proposals shall be evaluated by a selection committee. The selection committee reserves the right to conduct interviews of any or all proposers as it deems necessary. The City reserves the right to shorten the list of proposers selected for interviews or further evaluation.

The City reserves the right to request a best and final offer (BFO), and to re-score evaluations based on the best and final offer. Proposers may be required to provide clarification of their proposal as part of the BFO response.

2.19 **Copies:** One (1) unbound, printed and signed original and two (2) identical, printed copies of the proposal and supporting documents must be submitted in response to this RFP. All responses must relate to the specifications as outlined.

2.20 **Contacts:** Proposers must submit proposals in accordance with the instructions contained in this RFP. All requested information must be submitted with the proposal. Instructions for preparation and submission of proposals are contained in this package. All questions regarding this RFP should be submitted in writing and emailed to the person listed on the
**2.21 Minority/Woman Business Enterprise Goals:** The City of Savannah desires that this project shall have the strongest possible participation of minority and women-owned business enterprises (MWBEs), which employ local residents and otherwise support the local economy. M/WBE firms must have a current certification as such by the City of Savannah or an approved certifying agency. Proposers should embrace this goal and demonstrate meaningful local M/WBE participation as follows:

A. Prime Contract Level M/WBE Participation – Meaningful MWBE participation may take the form of a teaming agreement, partnership, mentor-protégé relationship, joint venture, or similar relationship wherein the M/WBE partner shares in a significant portion of management responsibility and profit-making potential. The proposer shall:

1. Provide names of M/WBE firms that are part of prime contractor bid team.
2. Provide a copy of teaming, joint venture or other equivalent agreement(s) between parties on a prime contractor bid team, if any, setting forth roles and responsibilities and profit-sharing arrangements.
3. Describe roles and responsibilities of each company and its employees.
4. Provide anticipated percentage of M/WBE/participation for each participant on the team.
5. Provide letter of commitment from lead firm, addressed to the City of Savannah, regarding association with each participant on the prime contractor level team.
6. Provide letters of commitment from each local M/WBE firm, addressed to the City of Savannah regarding association with lead firm.

B. Sub-Contractor Level M/WBE Participation – To the extent the proposer intends to employ sub-contractors it shall provide a written plan for how it will ensure that M/WBE firms have the maximum possible opportunity to participate in prime and second tier sub-contracts that will be available in the completion of this contract.

1. The plan should include the proposer’s best estimate of the percentage of M/WBE participation (based on subcontract values) it expects to be able to achieve in this project from subcontractors.
2. The plan shall include estimated dollar amounts of subcontract values that are used to estimate an overall proposal from the proposer.

Points will be allocated based on each respondent’s proposed M/WBE goal, with the maximum points of four (4) being awarded to the respondent who submits the highest proposed M/WBE goal at the prime contractor level, and six (6) being awarded to the respondent who submits the highest proposed M/WBE goal at the sub-contractor level. Points will be allocated to each respondent by using the following mathematical calculation:
i. In the case of the award based on the prime contractor level:

\[
\text{Respondent’s Proposed M/WBE Goal} \times 4 = \text{Weighted Score}
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\text{Highest Proposed M/WBE Goal}
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ii. In the case of the award based on the sub-contractor level:

\[
\text{Respondent’s Proposed M/WBE Goal} \times 6 = \text{Weighted Score}
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\text{Highest Proposed M/WBE Goal}
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No proposals will be deemed non-responsive due to this factor.

2.22 **Optional and Value-Added Products and Services:** A vendor may propose optional, value-added products and services that would support the proposed cemetery management software solution. The vendor must identify the use, functionality, and purpose of the proposed optional and value-added items and provide a detailed explanation of how the City of Savannah would benefit from electing to procure those items. Pricing for proposed items must be included in Section IV of vendor’s proposal. Pricing for optional and value-added products and services must be provided separately from required equipment/services.

2.23 **Price Reduction:** If, during the life of the contract, the contractor’s net prices to its customers for the same product(s) and/or services shall be reduced below the contracted price, it is understood and agreed that the City shall receive such price reduction.

2.24 **Contract Period:** The initial contract period shall be for a period of one (1) year or (12 months) and prices shall remain firm through that period. This contract may be renewed for up to four (4) additional twelve (12) month periods, if all contracting parties so agree, if services provided by the vendor have been satisfactory and if funding is available.
Section III
Functional Requirements

3.1 Functional Requirements:

The following components represent the system functionality that is required. Respond to each item with a description of how the proposed system provides that functionality. Incorporate screenshots or diagrams as needed to describe the functionality.

A checklist of functional requirements is also presented in Section III for the vendor to further verify system functionality.

The proposer may be required to provide an on-site demonstration of the functionality of the proposed solution at the City’s request.

- Provides multi-user environment allowing a minimum of 7 users simultaneous access with multiple tiers of user access
- Cloud-based (Preferred) or on-premise software
- Provides web-based access from multiple workstations or locations
- Provides user-based views and dashboard with customizable statistics and graphs
- Ability to create customizable modules
- Provides ability to track and manage multiple cemeteries
- Tracks and manages all cemetery sales (with variable price structures based on cemetery and location within the cemetery) including, but not limited to, lot sales, interments, work permits, and tours/events
- Ability to track and manage A/R including generating and printing invoices and sales receipts
- Tracks and manages interments, including tracking assigned staff member(s) and appointments
- Tracks and manages lot inventory in real-time using color-coding to indicate current ownership status
- Ability to track changes in lot ownership in real-time
- Ability to track maintenance activities (work orders)
- Provides a customizable reporting mechanism with downloading and printing capability
- Ability to generate and print various documents to include, but not limited to, deeds, interment orders, lots cards, decreased cards, owner cards, and envelopes
- Provides audit trail and logging
- Ability to archive records as needed using “Active” and “Inactive” or equivalent
- Provides cemetery mapping (must integrate with ESRI ArcGIS)
• Ability to map structures to include, but not limited to, monuments, benches, fountains, and trees
• Ability to print detailed maps of cemeteries and lots
• Ability to upload documents and attach to lots, lot owners, or interment records
• Provides web access of selected historical records for genealogical research
• Mobile navigation to any gravesite
• Provides field access for staff via mobile devices
• Compatible with a kiosk
• **Email Interface:** Compatibility with Microsoft Outlook is preferred.
• **Microsoft Office Interface:** Exported documents must be compatible with the Microsoft Office Suite, specifically, Microsoft Word and Microsoft Excel.
• **Archiving:** The system needs to provide an archiving functionality to track and store cemetery records as needed with the ability to seamlessly retrieve/reactivate records.
• **Audit Log:** The system must provide a transactional audit log tracking all system modifications and associated user, date and time.
• **System Security:** The system needs to be able to limit user access through security groups. The ability to add and remove users and change user access levels needs to be performed by the on-site System Administrator. These user-access security settings need to extend to include related documents or attachments.
• **System Configurability:** The system must offer flexibility for City staff to configure screen layout and create customized fields and reports. The ability to customize individual modules is preferred.
• **System Administration:** Provide a description of the system architecture to include hardware and software requirements. Define all modules and components of the proposed system. Identify any third-party components. Provide “Best Practice” guidelines for system administration, backups, and disaster recovery.
• **Mobile Device Integration:** The system must allow for mobile access to data for authorized users. Describe the mobile platform and devices supported.
• **Website Integration:** They system must allow for integration with City’s website (Powered by CivicPlus).
Functional Requirements Checklist

Place an “X” in the appropriate column to indicate how your solution meets the requirement. Provide comments where necessary. Please mark only one of the appropriate replies.

Legend of Responses
(F) Fully provided: this function is provided in the proposed solution “Out-of-the-Box”, no customizations or modifications are necessary.
(CO) Configuration: this function requires configuration / setting changes by System Administrator(City staff); does not require custom programming by vendor).
(CU) Customization: (requires custom programming by the vendor; changes to source code).
(R) Reporting Tool: this function is accomplished by the reporting functionality / reporting tool provided with the proposed solution.
(TP) Third-Party Software: this function is accomplished by a third-party application provided with the proposed solution.
(FV) Future Version: this function will be included in a future release of the system. Please provide an expected date for this release in the Comment field.
(NA) Not Available: this function is not available in the proposed solution.
Comment: Please use the comment field as needed to explain the response.

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### Functional Requirements

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| | Ability to generate and print documents to include:  
  Deeds;  
  Interment orders (sales contracts);  
  Lot cards;  
  Owner cards;  
  Deceased cards;  
  Envelopes | | | | | | | |

### Reports

- Customizable reporting mechanism w/ ability to download and print reports
- Ability to export financial data to various formats:  
  (to include, but not limited to)  
  Excel (.xlsx)  
  Text (.txt)  
  Comma Separated Value (.csv)
- Standardized(canned) and ad-hoc reporting functionality is required. A user-friendly reporting tool is a must.
- Provide a list of all standardized reports that are available.
- Ability to monitor and generate reports to track (to include, but not limited to) interments; Lot Sales; Work permits; Tours/Events
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<td>Provides GIS cemetery mapping (must integrate with ESRI ArcGIS) Ability to print detailed maps of cemeteries and lots Ability to provide detailed layout of each cemetery lot Ability to map structures to include, but not limited to: Monuments; Benches; Fountains; Trees; Buildings, etc;</td>
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<td><strong>Archiving</strong></td>
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<td>Ability to move the record to “Archived” status based on Closed Date criteria defined by the City Queries and Report searches must provide filter to include Archived records Ability to move the record back to “Active” status</td>
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<td>3.1</td>
<td>Functional Requirements</td>
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<td>CO</td>
<td>CU</td>
<td>R</td>
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<td>FV</td>
<td>NA</td>
<td>Comment</td>
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<tr>
<td><strong>Audit Log</strong></td>
<td>Provides audit trail and logging to include when documents are viewed and/or updated. Detailed information should be recorded including who initiated any transaction and what time records were accessed or updated.</td>
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<td>Audit data is viewable through the user interface (to an administrator with appropriate security permissions)</td>
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<td>Records should not be able to be deleted, should be flagged “inactive” or “archived”</td>
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<td><strong>System Security</strong></td>
<td>Ability to restrict access at the following levels: (to include, but not limited to:) Group or Role level User level Record level Field level File level Attached document</td>
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<td><strong>System Administration</strong></td>
<td>Ability to backup system software and data Ability to recover missing or corrupt file/table</td>
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<td><strong>Mobile Access</strong></td>
<td>Compatible with mobile device (smartphone, tablet) Provides navigation to cemetery sites via mobile device (smartphone, tablet)</td>
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<td>3.1</td>
<td><strong>Functional Requirements</strong></td>
<td>F</td>
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<td>CU</td>
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<td>NA</td>
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<td></td>
<td>Provides limited access to external users via website</td>
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<td>Compatible with current system</td>
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<td>Describe kiosk options</td>
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<td><strong>City of Savannah Website Integration</strong></td>
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<td></td>
<td>Ability to integrate with City’s website (Powered by CivicPlus)</td>
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<td><strong>Optional Items</strong></td>
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<td>Describe E-commerce options</td>
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<td>Inventory management of products to sell</td>
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SECTION IV

FEE PROPOSAL

I have read and understand the requirements of this request for proposal RFP Event # 4654 and agree to provide the requested system in accordance with this proposal and all attachments, exhibits, etc. The proposed fee shall include all labor, material and equipment to provide the system as outlined including any required communications devices, computer hardware and software, any travel or per diem expenses and any other miscellaneous expense involved. Additional pages may be included to provide detail of costs.

Option 1: Site License:

<table>
<thead>
<tr>
<th>Software</th>
<th>Cost:</th>
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<tbody>
<tr>
<td>Site License</td>
<td>$</td>
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<tr>
<td>Implementation Services</td>
<td>$</td>
</tr>
<tr>
<td>Software Maintenance:</td>
<td></td>
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<tr>
<td>Year 2:</td>
<td>$</td>
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<td>Year 3:</td>
<td>$</td>
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<td>Year 4:</td>
<td>$</td>
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<td>Year 5:</td>
<td>$</td>
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</tbody>
</table>

Option 2: Per Seat Licensing for Concurrent Users/Viewers

<table>
<thead>
<tr>
<th>Users</th>
<th>Cost:</th>
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<tbody>
<tr>
<td>1-10 users</td>
<td>$</td>
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</table>

Training:

<table>
<thead>
<tr>
<th>Training</th>
<th>Cost per person</th>
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</thead>
<tbody>
<tr>
<td>Users</td>
<td>$</td>
</tr>
<tr>
<td>Travel</td>
<td>$</td>
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<tr>
<td>Materials</td>
<td>$</td>
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Data Conversion:

<table>
<thead>
<tr>
<th>Data Conversion</th>
<th>Cost</th>
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<tbody>
<tr>
<td>Lump Sum</td>
<td>$</td>
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</tbody>
</table>
SUBMITTED BY: _______________________________

PROPOSER: _______________________________

SIGNED: __________________________________

NAME (PRINT): ______________________________

ADDRESS: __________________________________

CITY/STATE: __________________________ ZIP ________

TELEPHONE: (_______) _____________
Area Code

FAX: (_______) _____________
Area Code

INDICATE MINORITY OWNERSHIP STATUS OF BIDDER (FOR STATISTICAL PURPOSES ONLY):
CHECK ONE:

_____ NON-MINORITY OWNED

_____ ASIAN AMERICAN

_____ AFRICAN AMERICAN

_____ AMERICAN INDIAN

_____ HISPANIC

_____ OTHER MINORITY

_____ WOMAN

CONFIRM RECEIPT OF ANY ADDENDA ISSUED FOR THIS PROPOSAL:
ADDITIONUM ______ #
DATE ______________________

DID YOU INCLUDE YOUR COMPLETED RESPONSE TO ATTACHMENT 1 WITH YOUR PROPOSAL? YES ______ NO _______

DID YOU INCLUDE YOUR COMPLETED RESPONSE TO ATTACHMENT 2 WITH YOUR PROPOSAL? YES ______ NO _______
ATTACHMENT 1

REFERENCES

Per Section 2.13, proposers shall provide a minimum of three (3) references that are using the proposed system. References should be operating a similar size and type organization (i.e. municipal cemetery management office). Provide contact names and phone numbers for the person(s) responsible for the operation of the systems.

1. Name of Company/Municipality: __________________________
   Address: __________________________
   Contact: __________________________
   Phone: __________________________
   Dates janitorial service provided: __________________________

2. Name of Company/Municipality: __________________________
   Address: __________________________
   Contact: __________________________
   Phone: __________________________
   Dates janitorial service provided: __________________________

3. Name of Company/Municipality: __________________________
   Address: __________________________
   Contact: __________________________
   Phone: __________________________
   Dates janitorial service provided: __________________________

4. Name of Company/Municipality: __________________________
   Address: __________________________
   Contact: __________________________
   Phone: __________________________
   Dates janitorial service provided: __________________________

5. Name of Company/Municipality: __________________________
   Address: __________________________
   Contact: __________________________
   Phone: __________________________
   Dates janitorial service provided: __________________________
Any M/WBE listed in this completed form must be certified by the City of Savannah and/or other certifying agency such as USDOT, GDOT, SBA 8(a) or GMSDC prior to the due date of this bid. Proof of M/WBE certification such as a certificate or letter from the certifying agency is required to accompany the bid. A firm that has submitted an application for M/WBE certification or an application for M/WBE certification under review but has not been certified is not qualified as a certified M/WBE and will not be recognized as such during the City’s evaluation process.

Name of Proposer: ___________________________  Event No. 4654

Project Title: ___________________________

NOTE: Unless certified through the City of Savannah's MWBE Program, proof of MWBE certification must be attached to this completed form for all firms listed in the table below.

<table>
<thead>
<tr>
<th>Name of M/WBE Participant</th>
<th>Name of Majority Owner</th>
<th>Telephone</th>
<th>Address (City, State)</th>
<th>Type of Work Sub-Contracted</th>
<th>Estimated Sub-contract Value</th>
<th>MBE or WBE</th>
<th>City Certified Y or N</th>
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MBE Participation Value: _____ %  Women Participation Value: _____ %

The undersigned will enter into a formal agreement with the M/WBE Subcontractors/Proposers identified herein for work listed in this schedule conditioned upon executing of a contract with the Mayor and Aldermen of the City of Savannah. The Prime’s subcontractors’ subcontractors must enter into a formal agreement with the tier subcontractor identified herein for work listed in this schedule. It is the responsibility of the Prime contractor to ensure compliance by all subcontractors.

**Joint Venture Disclosure**

If the prime bidder 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 Minority/Female joint venture firm.

<table>
<thead>
<tr>
<th>Joint Venture Firms</th>
<th>Level of Work</th>
<th>Financial Participation</th>
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NOTE: The Minority/Women Owned Business Office is available to assist with identifying certified M/WBEs. Please contact the M/WBE Office at (912) 652-3582. The City of Savannah’s certified M/WBE registry is posted on its website @ www.savannahga.gov.
Developing a Strong M/WBE Participation Plan

**Key facts every bidder/proposer needs to know prior to developing their M/WBE Participation Plan:**

1. All bidders/proposers must submit a “Proposed Schedule of M/WBE Participation” which identifies the minority and/or woman-owned companies that have agreed to participate in the project if awarded. All companies listed on the form must be certified as either minority-owned and controlled or woman-owned and controlled. The City does not accept a company’s “self-identification” as minority or woman-owned.

2. **Proof** of M/WBE certification from the certifying agency is required to accompany the bid; and certification must have been completed by the City of Savannah, a federally-recognized or a state-level certifying agency (USDOT, State DOT, SBA 8(a) or GMSDC) utilizing certification standards comparable to the City of Savannah.

3. The certification must have been approved prior to the due date of this bid. A firm that has submitted an application for certification but has not been certified will not be counted toward the M/WBE goal.

4. The M/WBE Office will be contacting all M/WBE firms included in the bidder’s M/WBE Plan to confirm each: a) was contacted by the bidder/proposer; b) performs the type of work listed; and c) agreed to participate.

5. To expedite the verification process, bidders/proposers need to: provide accurate phone numbers for all M/WBEs listed; ensure M/WBEs know to expect to be contacted by phone and email; request M/WBEs be accessible during the critical period before bid-opening; and advise M/WBEs that City staff must receive the M/WBE's confirmation that the firm agreed to participate in the bid/proposal in order for the prime contractor to receive credit toward their proposed M/WBE participation goals.

6. If a proposed M/WBE cannot be confirmed as certified, performing the type of work described or agreeing to participate, the bidder/proposer will be notified and given a pre-determined period to submit a correction. If an M/WBE still cannot be confirmed or replaced, the proposed percentage of participation associated with the unverified M/WBE firm will not be counted and will be deducted from the overall proposed M/WBE goal.

7. Any tier of M/WBE subcontractors or suppliers that will be utilized in the contract work may count toward the MBE and WBE goal as long as the tier subcontractors/suppliers are certified M/WBEs. Work that an M/WBE subcontracts to a non-M/WBE firm does not count toward the M/WBE goal.

8. M/WBEs must perform a “commercially useful function” which is the provision of real and actual work or products, or performing a distinct element of work for which the business has the skills, qualifications and expertise, and the responsibility for the actual management and supervision of the work contracted.

9. Per the *Proposed Schedule of M/WBE Participation* “the undersigned (bidder/proposer) will enter into a formal agreement with the M/WBE Subcontractors/Proposers identified herein for work listed in this schedule, conditioned upon executing a contract with the Mayor and Aldermen of the City of Savannah.” This signed commitment is taken seriously by the City, so do not list M/WBEs you do not plan to utilize. Any proposed changes must be pre-approved by the M/WBE Office, be based on legitimate business-related reasons, and still meet the M/WBE participation goals per the City’s contract.

10. A bidder who is a certified M/WBE may count toward the goal the portion of work or services on a City contract that is actually performed by the M/WBE, including: the cost of supplies/materials purchased or equipment leased for contract work, fees for bona fide services such as professional or technical services, or for providing bonds or insurance specifically required for the performance of a City contract.

11. If awarded the contract, the MWBE Office will be reviewing your company’s subcontracts, invoices and payment records to substantiate the completion of work and payment of M/WBEs. If the prime contractor is an M/WBE that is being included in its M/WBE goal, the prime contractor must maintain records that will be inspected to prove the portion of work performed, cost of work, and payments to the prime company.

12. Most bids for goods and materials do not have specific M/WBE goals established for the contract. If no goals are include in the scope of work or General Specifications, you are not required to submit MWBE participation but encouraged to do so when the opportunity is available. The City maintains this information for statistical purposes only and it is not reflected in the award decision.