



Event No.4799

## DELINQUENT TAX COLLECTION SERVICES - ANNUAL CONTRACT

### SECTION II

#### SCOPE OF WORK

**2.0 Broad description of project:** The City of Savannah's Revenue Department seeks to contract with an outside contractor to manage its delinquent tax collection program for real and personal property. It is expected that the following professional services will be provided:

- Initial pursuit of delinquent taxes via standard collection notices (maximum of two (2) notices)
- Secondary pursuit of delinquent taxes via filing of tax executions (fi. fa.'s) and all legally required notices pertaining to such executions
- Conduct thorough searches for bankruptcy filings and for all entities with an interest in the property in question
- Prepare all legal notices, advertisements, and abstracts required throughout the levy process

Electronic submissions will not be accepted.

#### **2.1 Scope of Services**

The contractor shall conduct the above process in accordance with approved collection procedures established by the Fair Debt Collection Practice Act and shall conform with all federal, state, and local laws pertaining to the above procedures.

#### **2.2 Methodology**

The proposer shall provide a detailed account of the methodology to be used in the collection of delinquent taxes due the City of Savannah.

#### **2.3 Fee Schedule**

The proposer shall provide a detailed cost schedule for executing each phase of the above services including any administrative costs such as postage and filing or recording fees. The City would prefer a flat fee proposal for successful collection efforts with all tax payments paid directly to the City.

## **2.4 Schedule**

The proposer shall prepare and submit a timeline for completing the delinquent tax sale process.

## **2.5 Non-Collusion Statements**

In order for bids to be considered, a non-collusive statement must be submitted with the bid. A sample non-collusive bid statement is attached. Bidders may elect to submit their own notarized non-collusion statement.

## **2.6 Qualifications**

The proposer shall provide the following information to document experience in the tax collection industry. Experience in local government collection activities in the State of Georgia will be viewed more favorably.

- 2.6.1 Firm overview: Provide a brief, one (1) page overview of your firm including types of taxes collected, number of years providing tax collection services, total tax revenue collected for each type of tax in the last five (5) years, all services offered by the firm (including all data processing services and capabilities), and number of employees.
- 2.6.2 Key employees: Provide a list and resume or other statement of qualifications of key employees including the individuals who will be the City of Savannah's primary and secondary contact persons and other individuals who perform key roles in the tax collection process.
- 2.6.3 Other RFP responses: Provide a list of other tax collection committee RFP's to which your firm has responded or plans to respond.
- 2.6.4 Business volume capacity: The City of Savannah is concerned about the capacity of tax collection agencies to handle the expanded volume of business. Please address in detail the proposer's capacity to effectively handle all tax collection services for current and proposed clients, including details of any planned steps to add people, facilities, or other resources.
- 2.7.5 Litigation and claims: List any legal proceedings including (arbitration, complaint, court action, or claim filed, commenced, or made by a municipality, other government body, employer, or taxpayer against proposer's firm within the last ten (10) years. Please also provide a brief summary of the status of final resolution of any proceeding or claim.
- 2.6.6 Current client list: Provide a list of current clients as well as the proposer's associated collection ratio.

2.6.7 References: Provide references from related clients including contact persons and phone numbers.

## **2.7 Contract Period**

This is an annual contract and prices are to be held firm for a period of one (1) year (12 months). This agreement may be renewed for up to four (4) additional twelve (12) month periods, if all contracting parties so agree and services provided by the vendor have been satisfactory.

## 2.8 Proposal Format

Proposals shall be submitted in the following format and include the following information:

- a) Detailed description of qualifications and capabilities as requested
- b) Fee proposals per instructions in Section III signed by responsible party
- c) Proposed Schedule of Minority and Women owned Business Participation and Non-Discrimination Statement.
- d) Other submittals as stated.

## 2.9 Basis of Award

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

- a) Proposer's qualifications and experience, including local government experience *(25 points)*
- b) Methodology *(20 points)*
- c) Capabilities and Capacity *(20 points)*
- d) Fees *(20 points)*
- e) References *(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.

**2.10 Copies:** One (1) unbound, printed, and signed original, and five (5) identical, printed copies, and one (1) electronic copy on a flashdrive of the proposal and supporting documents must be submitted in response to the RFP. All responses must relate to the specifications as outlined.

**2.11 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 request for proposal should be submitted in writing and emailed to the person listed on the summary event page.

**2.12 Fees:** Proposer shall submit fees based on the detailed listing in Section III of the RFP.

## 2.13 Insurance Requirements

### 2.13.1 Comprehensive General Liability

Contractor shall carry comprehensive general liability on an occurrence form with no “x, c or u” exclusions with the following minimum limits:

- Each occurrence - \$2,000,000
- Damage to Rented Premises - \$1,000,000
- Medical Expense - \$5,000
- Personal & Adv Injury - \$1,000,000
- General Aggregate - \$2,000,000
- Products – Completed Ops. Aggregate - \$2,000,000

General aggregate shall apply on a per project basis

Contractor will provide a Certificate of Insurance reflecting required coverage.

A waiver of subrogation endorsement to the policy in favor of the City shall also be provided and attached to the certificate

A (30) day notice of cancellation in favor of the City must be endorsed to policy and attached to the certificate

### 2.13.2 Professional Liability

\$ 1,000,000 per occurrence limit

### 2.13.3 Commercial Automobile Liability

The automobile policy must include coverage for owned, non-owned and hired automobiles

- Minimum limits are \$1,000,000
- Contractor will provide a Certificate of Insurance reflecting required coverage.
- A waiver of subrogation endorsement to the policy in favor of the City shall also be provided and attached to the certificate
- A (30) day notice of cancellation in favor of the City must be endorsed to policy and attached to the certificate

### 2.13.4 Workers Compensation

Contractor shall carry a workers compensation policy including all statutory coverage required by Georgia state law

Minimum employer’s liability limits:

- \$500,000 each accident
- \$500,000 each employee (disease)
- \$500,000 policy limit (disease)

Contractor will provide a Certificate of Insurance reflecting required coverage.

A waiver of subrogation endorsement to the policy in favor of the City shall also be provided and attached to the certificate

A (30) day notice of cancellation in favor of the City must be endorsed to policy and attached to the certificate

#### 2.13.5 Umbrella/Excess Liability

Contractor shall carry an umbrella/excess liability policy which must follow form over underlying policies: general liability, auto liability and employer's liability.

Minimum limits:

- \$2,000,000 per occurrence
- \$2,000,000 aggregate

Contractor will provide a Certificate of Insurance reflecting required coverage.

Waiver of subrogation endorsement to the policy in favor of the City shall also be provided and attached to the certificate

A (30) day notice of cancellation in favor of the City must be endorsed to policy and attached to the certificate

#### 2.13.6 General

All insurance shall be placed with Georgia admitted carriers with a current Best's rating of A (minus), X, or better

Any modifications to specifications must be approved by the City



**INDICATE MINORITY OWNERSHIP STATUS OF PROPOSER (FOR STATISTICAL PURPOSES ONLY):**

**CHECK ONE:**

**NON-MINORITY OWNED**

**AFRICAN AMERICAN**

**HISPANIC**

**WOMAN** (non-minority)

**ASIAN AMERICAN**

**AMERICAN INDIAN**

**OTHER MINORITY** Describe \_\_\_\_\_



**NON-DISCRIMINATION STATEMENT**

The bidder certifies that:

- (1) No person shall be excluded from participation in, denied the benefit of, or otherwise discriminated against on the basis of race, color, national origin, or gender in connection with any bid submitted to the City of Savannah or the performance of any contract resulting therefrom;
- (2) That it is and shall be the policy of this company to provide equal opportunity to all business persons seeking to contract or otherwise interested in contracting with this company, including those companies owned and controlled by racial minorities, cultural minorities, and women;
- (3) In connection herewith, we acknowledge and warrant that this company has been made aware of, understands and agrees to take affirmative action to provide such companies with the maximum practicable opportunities to do business with this company;
- (4) That this promise of non-discrimination as made and set forth herein shall be continuing in nature and shall remain in full force and effect without interruption;
- (5) That the promises of non-discrimination as made and set forth herein shall be and are hereby deemed to be made as part of and incorporated by reference into any contract or portion thereof which this company may hereafter obtain and;
- (6) That the failure of this company to satisfactorily discharge any of the promises of non-discrimination as made and set forth herein shall constitute a material breach of contract entitling the City of Savannah to declare the contract in default and to exercise any and all applicable rights and remedies including but not limited to cancellation of the contract, termination of the contract, suspension and debarment from future contracting opportunities, and withholding and/or forfeiture of compensation due and owing on a contract.

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

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

**PROPOSED SCHEDULE OF M/WBE PARTICIPATION**

All M/WBEs listed **must be certified as a minority-owned or women-owned business** by the City of Savannah or a federally-recognized or state-level certifying agency (such as USDOT, State DOT, SBA 8(a) or GMSDC) that utilizes certification standards comparable to the City of Savannah **prior** to the due date of this bid. **Other business certifications that do not specify majority woman or minority ownership may not be substituted. Proof of M/WBE certification from the certifying agency is required to accompany the bid.** A firm that has submitted an application for M/WBE certification 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. To expedite verification, please provide accurate phone numbers for all M/WBEs listed and ensure firms understand contact will be made following bid submittal.

Name of Proposer: \_\_\_\_\_

Event No. 4799

Project Title: \_\_\_\_\_

**NOTE: Unless certified through the City of Savannah M/WBE Program, proof of M/WBE certification must be attached for all firms listed.**

Name of M/WBE Participant	Name of Majority Owner	Telephone	Address (City, State)	Type of Work Sub-Contracted	Estimated Sub-contract Value	MBE or WBE	Certified ? (Y or N)	Certifying Agency? (City of Sav. or Other)
					%			
					%			
					%			
					%			
					%			
					%			

MBE Participation Value: \_\_\_\_\_ % WBE Participation Value: \_\_\_\_\_ % M/WBE 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 a contract with the Mayor and Aldermen of the City of Savannah.** The Prime’s subcontractor that subcontracts work must enter into a formal agreement with the tier subcontractor identified herein for work listed in this schedule. The Prime may count toward the goal any tier of M/WBE subcontractors and/or suppliers that will be utilized in the contract work. However, when an M/WBE subcontracts part of the work, the value of the subcontracted work may **only** be counted toward the goal **if the tier subcontractor is an M/WBE**. Any work an M/WBE firm subcontracts to a non-M/WBE firm **will not count toward the M/WBE goal**. It is the responsibility of the Prime contractor to advise all M/WBEs of this requirement and to ensure compliance by subcontractors.

**Joint Venture Disclosure**

If the prime bidder is a joint venture, please describe the nature of the joint venture, the level of work and the financial participation to be provided by the Minority/Female joint venture firm in the space provided below.

Joint Venture Firms	Level of Work	Financial Participation

Printed name (company officer or representative): \_\_\_\_\_

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

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

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

*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](http://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 MWBE 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.

## ***NON-COLLUSION AFFIDAVIT***

I state that I am \_\_\_\_\_ of \_\_\_\_\_, and that  
(Name of authorized agent) (Company Title)

I am authorized to make this affidavit on behalf of my firm, and its owners, directors, officers, and employees.

I state that:

1. The terms of this proposal have been arrived at independently and without consultation, communication or agreement with any other provider or potential provider of tax collection services.
2. We have not discussed with other providers of delinquent tax collection services the request for proposals to which we have submitted or will be submitting proposals for delinquent tax collection services, or the terms under which our firm is offering to provide tax collection services to taxing authorities.
3. None of the terms of this proposal have been disclosed, directly or indirectly, to any other provider or potential provider of tax collection services, and they will not be disclosed, directly or indirectly, to any other provider or potential provider of tax collection services until made public by the city of Savannah.
4. The price or prices in the attached bid are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.
5. \_\_\_\_\_, its affiliates, subsidiaries, owners officers, directors, and employees are not currently under investigation or order by or from any court or governmental agency, and have not in the last 10 years been accused of, investigated for, or subject to any order relating to, any alleged act prohibited by state or federal law in any jurisdiction, involving conspiracy, collusion, or other violation of law with respect to bidding on any public contract.
6. I and my firm acknowledge that the above representations are material and important and will be relied on by the city of Savannah in entering into a contract for the services for which this proposal is submitted. I understand and my firm understands that any misstatement in this affidavit is and shall be treated as fraudulent concealment from the city of Savannah of the true facts relating to the submission of the proposal.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name and Title

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State of \_\_\_\_\_

County of \_\_\_\_\_

Subscribed and sworn before me this \_\_\_\_\_ day of \_\_\_\_\_, 2017.

Notary Public  
My commission expires: \_\_\_\_\_