



WHITE COUNTY, GEORGIA

BOARD OF ASSESSORS

REQUEST FOR PROPOSALS

White County Board of Assessors is soliciting proposals for
Business Personal Property Audit

PROPOSALS DUE:
Thursday, October 25, 2018
3:00 p.m.

SUBMIT PROPOSALS TO:

White County Board of Assessors
1241 Helen Highway
Suite 180
Cleveland, GA 30528
White County Georgia



WHITE COUNTY BOARD OF ASSESSORS
1241 HELEN HIGHWAY
SUITE 180
CLEVELAND, GA 30528
706-865-5328

REQUEST FOR PROPOSALS

BOA2018-001

ISSUE DATE: Tuesday, September 18, 2018

White County, Georgia is requesting proposals (RFP) from qualified individuals or firms with experience in conducting business personal property audits. The purpose of this audit is to determine the fair market value of business personal property located within the County's jurisdiction. The authority to employ persons or firms for this purpose is provided by O.C.G.A. 48-5-298, Et-al.

Schedule

Schedule	
RFP Issue Date	Tuesday, September 18, 2018
Deadline for Proposal Questions	Thursday, October 18, 2018 @ 5:00 p.m.
Deadline for Addenda To Be Posted to www.whitecounty.net	Monday, October 22, 2018
Submittal Deadline	Thursday, October 25, 2018 @ 3:00 p.m.
Tentative Award Date	Thursday, November 8, 2018

Questions regarding this proposal and specifications should be directed to:

White County Board of Assessors Office
Attn: Bryan Payne, Chief Appraiser
1241 Helen Hwy, Ste. 180
Cleveland, GA 30528
(706) 865-5328
bpayne@whitecounty.net

Proposals will be received until 3:00 p.m. on Thursday, October 25, 2018. Proposals will be publically opened and only the name of the vendor will be read at 3:30 P.M. on the same date. Proposals must be typed or submitted in black ink. All proposals must include four copies and be enclosed in a sealed envelope or container with the following information clearly marked on the outside of the envelope or container.

The envelope or container must be mailed or delivered to:

White County Board of Assessors
1241 Helen Hwy, Ste. 180
Cleveland, GA 30528
ATTN: Bryan Payne

Proposals received after the announced time and date due, whether mailed or delivered, will be returned unopened. Nothing herein is intended to exclude any responsible vendor or in any way restrain or restrict competition among vendors. Selection criteria will include an evaluation of the scope of services proposed, experience, references and price. Vendors are encouraged to be specific as to their understanding of the task to be performed and their proposed procedures for implementation.

The County of White reserves the right to award in part or in whole or to reject any or all proposals, to waive technicalities or require additional information prior to award. Enclosed is a "Proposal Requirement and Non-Collusion Statement" that shall be signed and returned with the proposal.

All vendors submitting a proposal will be notified in writing of award.

Respectfully Submitted,
White County, Georgia
Board of Assessors

SPECIAL TERMS AND CONDITIONS

During the performance of any contract awarded pursuant to this RFP, the contractor agrees as follows:

- A. The vendors will not discriminate against any employee or applicant for employment because of race, religion, color, sex, or national origin, or handicaps, except where religion, sex or national origin is a bona fide occupational qualification reasonably necessary to the operation of the vendors. The vendor agrees to post in conspicuous places, available to employees and applicants for employments, notices setting forth the provisions of this nondiscrimination clause.
- B. The vendor, in all solicitations or advertisements for employees placed on behalf of the contractor, will state that such vendor is an equal opportunity employer.
- C. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.

Insurance / Required Affidavits / License

Contractor, performing as an independent contractor, shall be fully responsible for providing Workers Compensation, Commercial General Liability and Automotive Liability coverage as follows. Proof of Insurance and required affidavits must be included in proposal.

General Liability - \$2,000,000 General Liability with a combined single limit per occurrence of \$1,000,000, for bodily injury, personal injury, and property damage.

Automobile Liability - \$1,000,000 Automobile Liability combined single limit per accident, for bodily injury and property damage, when applicable.

Workers' Compensation and Employers' Liability - \$100,000 Employers' Liability limit per accident and Worker's Compensation limits as required by the Labor Code of the State of Georgia.

SCOPE OF WORK

White County Board of Assessors (the Board) is requesting qualified individuals and firms with experience in auditing Personal Property accounts for compliance to submit proposals for auditing services for business personal property verification. A contract shall be awarded on a per audit fixed-fee basis, with payment rendered upon completion of audit. Each contractor shall defend his or her audit findings throughout the appeals process. The audits performed will provide the Board with sufficient information to verify the accuracy of business personal property tax reports filed by White County business taxpayers for the current and two (2) prior years, if appropriate. All fees must be inclusive of salaries, travel, food and lodging incurred by the vendor in the audit performance. The authority to employ persons or firms for this purpose is provided by O.C.G.A. 48-5-298, Et-al.

1. An audit shall include the examination of a business payer's accounting records to verify the accuracy of the payer's personal property report filed with the White County Board of Assessors for the three (3) prior years while providing current years information when available.
2. Audits must be performed at the location at which the payer's accounting records are maintained and controlled unless otherwise agreed to by the Board of Assessors that the audit can be performed elsewhere.

3. The vendor shall be responsible for scheduling appointments with the payer or payer's agent for the performance of the audit following the assignment of the payer's names and files by the Board of Assessors. All appointments must be confirmed by written correspondence prepared in duplicate by the contractor and signed by the Board of Assessors.
4. At the discretion of the Board of Assessors, an employee of the Assessor's Office may be periodically assigned to accompany the vendor's auditor in the audit performance. All expenses of such employee shall be the county's responsibility.
5. The vendor's auditor shall conduct an in-depth review of all accounting records reflecting assets owned by business payers including both real and personal property and upon completion, shall prepare an audit report in such detail as may be necessary to adequately reflect the audit findings including, but not limited to, a summary of non-reported property, understatements in listings, over listings, etc. The audit report shall be furnished to the Board of Assessors for review and approval prior to further contact being made with the payer.
6. The vendor's auditor shall be available to the Board of Assessors for the purpose of defending the audit findings before the payer, payer's agent and through the appeals process. The county shall not be subject to any additional cost for auditors time involved in this process unless otherwise agreed to by the county.
7. The vendor shall be responsible for preparing all necessary correspondence applicable to an audit. All correspondence shall be prepared upon the Board of Assessors stationary and signed by the Board of Assessors or authorized personnel employed by the Board of Assessors. The county shall furnish to the contractor all stationary and envelopes necessary for preparing correspondence.
8. The vendor shall be responsible for computing the valuation of property arising from the audit which may be subject to assessment for the current and prior years. All valuations shall be determined by the application of the county's appraisal methodology adopted and employed for the current and prior years. The Board of Assessors shall be responsible for negotiating valuation disputes but may require assistance from the contractor on certain issues. No employee of the contractor shall attempt to negotiate valuation disputes unless authorized by the Board of Assessors.
9. The vendor will be required to perform audits consisting of payer's reports ranging in personal property valuation from more than \$ 7,500 in value to in excess of \$ 50,000,000 in value. The following is a breakdown of the number of audits to be performed by value size ranges as reflected by the current year County records.

<u>VALUATION RANGE</u>	<u>NUMBER OF AUDITS</u>
\$7,501 - \$ 50,000	<u>15</u>
\$50,001 - \$250,000	<u>10</u>
\$250,001 - \$1,000,000	<u>6</u>
\$1,000,001 - \$5,000,000	<u>1</u>
\$5,000,001 - \$50,000,000	<u>0</u>
ABOVE \$50,000,000	<u>0</u>

10. The vendor shall be required to maintain records relative to the status of each payer listing assigned by the county for audit. A status report must be furnished to the Board of Assessors at least monthly and more often if requested by the county.
11. The Board of Assessors and staff shall have full control over the audit program and will be available at all times for consultation with the vendor as may be deemed necessary to adequately implement and complete the audit program.

PROPOSAL REQUIREMENTS

Each proposal submitted shall include, but not necessarily be limited to the following:

1. A statement by the vendor of his understanding of the work to be done and a description of the approach and procedure which will be employed in conducting audits and implementing the audit program.
2. An implementation schedule giving length of time required to complete the approximately 32 audits. The maximum period shall not exceed twelve (12) months.
3. Biographies including professional experience of individuals who will be assigned directly to the project.
4. Project references and total number of ad valorem audits performed within the past four (4) years. Names, addresses, and telephone numbers of persons knowledgeable about the quality of work of the vendor on similar projects and who may be contacted for reference.
5. Demonstrated ability to successfully defend audit findings at any administrative or legal proceedings that may occur.
6. Demonstrated working knowledge of generally accepted appraisal principles, generally accepted accounting principles and the ability to utilize both in arriving at opinions of value of Business Personal Property.
7. Demonstrated working knowledge of Georgia law regarding ad valorem taxation.
8. Cost and payment proposal. Describe in detail the charges to White County for services offered and the expectation of the County for payment of such services.
9. Office space and or equipment requirements for auditors to perform task. Any required space, equipment or supplies, etc., to be provided by White County is to be itemized in detail.
10. Outline of staffing requirements for this project. Include any requirements of county personnel.
11. Describe recommended procedures of informing payers of the audit and audit results. Provide copies of types of correspondence used in all phases of the audit program implemented under prior contracts.
12. The proposal shall include location of office space where auditors will perform work and where audit records will be maintained. Any required space, equipment, supplies, etc., to be furnished by White County is to be specifically itemized.
13. Proposal Questions must be submitted by Thursday, October 18, 2018 . Answers to written questions and addenda will be posted on www.whitecounty.net on Monday, October 22, 2018. Proposals must be submitted by Thursday, October 25, 2018 at 3 o'clock P.M.

EVALUATION AND SELECTION CRITERIA

Selection shall be made of the offered deemed to be fully qualified and best capable among those submitting proposals on the basis of the factors listed below:

1. Vendor's experience in providing the services requested (10%)
2. Vendor's skills and capability to perform the service. (10%)
3. Vendor's ability to maintain an adequate staff and to meet the requirements of the proposal during the duration of the working relationship. (10%)
4. Response results from Vendor's references. (10%)
5. Vendor's responsiveness of the written proposal to the purpose and scope of services. (10%)
6. Cost (50%)

Negotiations shall be conducted with the Vendor so selected and a contract may be awarded to that Vendor. The County reserves the right to reject any and all proposals submitted.

PROPOSAL REQUIREMENTS AND NON-COLLUSION STATEMENT

My signature certifies that the proposal as submitted complies with all Terms and Conditions as set forth. My signature also certifies that the accompanying proposal is not the result of, or affected by, any unlawful act of collusion with another person or company engaged in the same line of business or commerce, or any act of fraud punishable under Georgia law. Furthermore, I understand that fraud and unlawful collusion are crimes under the Georgia Frauds Act. The Georgia Bid Rigging Act, and Georgia Antitrust Act, and Federal Law, and can result in fines, prison sentences, and civil damage awards.

I hereby certify that I am authorized to sign as a Representative for the Firm:

Name of Vendor: _____

Address: _____

Signature: _____

Name (type/print): _____ Title: _____

Telephone: _____ Date: _____



E-Verify Affidavit

Georgia Security & Immigration Compliance (GSIC) Act (CONTRACTOR) E-VERIFY AFFIDAVIT AND AGREEMENT

White County Commissioner and Contractor agree that compliance with the requirements of O.C.G.A. § 13-10-91 and Rule 300-10-1-.02 of the Rules of the Georgia Department of Labor are conditions of this Agreement for the physical performance of services.

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 contracting with the White County Commissioner has registered with and is participating in the federal work authorization program known as "E-Verify", web address <https://e-verify.uscis.gov/enroll/> operated by the United States Citizenship and Immigration Services Bureau of the United States Department of Homeland Security to verify information of newly hired employees, pursuant to the Immigration Reform and Control Act of 1986 [(IRCA), P.L. 99-603], in accordance with the applicability provisions and deadlines established in O.C.G.A. § 13-10-91. The undersigned Contractor also verifies that he/she/it is using and will continue to use the federal work authorization program throughout the contract period.

The undersigned Contractor agrees that, should it employ or contract with any subcontractor(s) in connection with the physical performance of services pursuant to the contract with the White County Commissioner, Contractor will secure from such subcontractor(s) similar verification of compliance with O.C.G.A. § 13-10-91 on the Subcontractor Affidavit provided in Rule 300-10-01-.08 or a substantially similar form. Contractor further agrees the Contractor will advise the White County Commissioner of the hiring of a new subcontractor and will provide White County Commissioner with a Subcontractor Affidavit attesting to the Subcontractor's name, address, user identification number, and date of authorization to use the Federal Work Authorization Program within five (5) days of the hiring before the Subcontractor begins working on the Project. Contractor also agrees to maintain all records of such compliance for inspection by White County Commissioner at any time and to provide a copy of each such verification to the White County Commissioner at the time the subcontractor(s) is retained to perform such services.

E-Verify Employment Eligibility Verification User identification Number

Date of Authorization to Use Federal Work Authorization Program

NAME OF CONTRACTOR

Title of Authorized Officer or Agent of Contractor

Signature and Printed Name of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME ON THIS THE _____ DAY OF _____, 20____.

Notary Public

My Commission Expires: _____

* As of the effective date of O.C.G.A. § 13-10-91, the applicable federal work authorization program is the "EEV / Basic Pilot Program" operated by the U.S. Citizenship and Immigration Services Bureau of the U.S. Department of Homeland Security, in conjunction with the Social Security Administration (SSA). Authority O.C.G.A. § 13-10-91. History: Original Rule entitled "Contractor Affidavit and Agreement" adopted F. May 25, 2007; eff. June