



Purchasing Department

140 Stonewall Avenue West, Ste 204
Fayetteville, GA 30214
Phone: 770-305-5420
www.fayettecountyga.gov

March 3, 2025

Subject: Request for Proposals #2531-P: Business Personal Property Compliance Audits

Gentlemen/Ladies:

Fayette County, Georgia invites you to submit a proposal for Business Personal Property Compliance Audits, in accordance with the information contained herein.

Questions concerning this Request for Proposals should be addressed to Michelle Sampson, Buyer & Contract Coordinator, in writing via email to msampson@fayettecountyga.gov. **Questions will be accepted until 3:00 p.m., Wednesday, March 26, 2025.** Purchasing Department office hours are Monday through Friday 8:00 a.m. to 5:00 p.m. The office telephone number is (770) 305-5150.

Please return your response to the following address:

Fayette County Government
Purchasing Department
140 Stonewall Avenue West, Suite 204
Fayetteville, GA 30214

Request for Proposals **2531-P**
Request for Proposals: **Business Personal Property Compliance Audits**

Your envelope *must* be sealed and should show your company's name and address.

Proposals will be received at the above address until 3:00 p.m., Wednesday, April 9, 2025, in the Purchasing Department, Suite 204. The proposals will be opened at this time. Proposals must be signed to be considered. Late proposals cannot be considered. Faxed or emailed proposals cannot be considered.

If you download this Request for Proposals from the County's website, it will be your responsibility to check the web site for any addenda that might be issued for this solicitation. The County cannot not be responsible for a vendor not receiving information provided in any addendum.

Sincerely,

Ted L. Burgess
Chief Procurement Officer

GENERAL TERMS AND CONDITIONS

RFP 2531-P: Business Personal Property Compliance Audits

1. **Definitions:**
 - a. **RFP:** Request for Proposals.
 - b. **Offeror:** A company or individual who submits a proposal in response to this RFP.
 - c. **Successful Offeror:** The offeror that is awarded a contract.
 - d. **Contractor:** The Successful Offeror, upon execution of the contract.
 - e. **County:** Fayette County, Georgia.
2. **Preparation of Offers:** It shall be the responsibility of the Offeror to examine specifications, scope of work, schedule and all instructions that are part of this request for proposal. Failure to observe any of the instructions or conditions in this request for proposal may result in rejection of the offer.

All of the specifications and information contained in this Request for Proposal, unless specifically accepted in writing by the Offeror and such exceptions being included with the offer, will form the basis of the contract between the Successful Offeror and the County. The Offeror should take care to answer all questions and provide all requested information.

3. **Submission of Offers:** Offerors must submit their proposal, along with any amendments issued by the County, in a sealed opaque envelope. *Price schedules* shall be placed in an additional opaque sealed envelope, identified as the price schedule, and enclosed in the sealed envelope with the proposal.

Mail or deliver one original, unbound proposal, signed in ink by a company official authorized to make a legal and binding offer, five bound paper copies, and a copy on a flash drive (do not include the *Price Schedule* on the flash drive) to:

Fayette County Government
Purchasing Department
140 Stonewall Avenue West, Suite 204
Fayetteville, GA 30214

RFP Number: **2531-P**
RFP Name: **Business Personal Property Compliance Audits**

4. **Timely Receipt:** Offers not received in the Purchasing Department by the time and date of the scheduled proposal opening will not be considered.
5. **Open Offer:** To allow sufficient time for a contract to be awarded, the offer, once submitted and opened, shall remain open for acceptance for a period of at least ninety (90) days from the date of the opening to the date of award.
6. **Corrections or Withdrawals:** The Offeror may correct a mistake or withdraw a proposal before the proposal opening date by sending written notification to the Director of Purchasing. Proposals may be withdrawn after the opening only with written authorization from the Director of Purchasing.

7. **Defects or Irregularities:** The County reserves the right to waive any defect or irregularity in any proposal received. In case of a discrepancy between unit prices and extended prices, the unit price will govern unless the facts or other considerations indicate another basis for correction of the discrepancy.
8. **Trade Secrets – Confidentiality:** If any person or entity submits a bid or proposal that contains trade secrets, an affidavit shall be included with the bid or proposal. The affidavit shall declare the specific included information which constitutes trade secrets. Any trade secrets must be either (1) placed in a separate envelope, clearly identified, and marked as such, or (2) at a minimum, marked in the affidavit or an attached document explaining exactly where such information is, and otherwise marked, highlighted, or made plainly visible. See Georgia law at O.C.G.A. § 50-18-72 (A)(34).
9. **Ethics – Disclosure of Relationships:** Before a proposed contract in excess of \$10,000.00 is recommended for award to the Board of Commissioners or the County Administrator, or before the County renews, extends, or otherwise modifies a contract after it has been awarded, the Contractor must disclose certain relationships with any County Commissioner or County Official, or their spouse, mother, father, grandparent, brother, sister, son or daughter related by blood, adoption, or marriage (including in-laws). A relationship that must be reported exists if any of these individuals is a director, officer, partner, or employee, or has a substantial financial interest in the business, as described in Fayette County Ordinance Chapter 2, Article IV, Division 3 (Code of Ethics).

If such relationship exists between your company and any individual mentioned above, relevant information must be presented in the form of a written letter to the Director of Purchasing. You must include the letter with any bid, proposal, or price quote you submit to the Purchasing Department.

In the event that a Contractor fails to comply with this requirement, the County will take action as appropriate to the situation, which may include actions up to and including rejection of the bid or offer, cancellation of the contract in question, or debarment or suspension from award of a County contract for a period of up to three years.

10. **Evaluation of Offers:** The evaluation of offers and the determination as to acceptability of services offered shall be the responsibility of the County. Accordingly, to ensure that sufficient information is available, the Offeror may be required to submit literature, samples, or other information prior to award. The County reserves the right to obtain clarification or additional information from any firm regarding its proposal. The County reserves the right to select a responsive, responsible firm based on best value that is deemed to be most advantageous to the County. The County further reserves the right to reject any proposal, or all proposals, and to re-release the request for proposals.
11. **Non-Collusion:** By responding to this Request for Proposals, the Offeror shall be deemed to have represented and warranted that the proposal is not made in connection with any other Offeror submitting a separate response to this request for proposals and is in all respects fair and without collusion or fraud.

12. **Ability To Perform:** The Offeror may be required, upon request, to provide to the satisfaction of the County that he/she has the skill, experience, and the necessary facilities, as well as sufficient financial and human resources, to perform the contract in a satisfactory manner and within the required time. If the available evidence is not satisfactory to the County, the County may reject the offer.
13. **Notice to Proceed:** The County shall not be liable for payment of any work done or any costs incurred by any Offeror prior to the County issuing a written Notice to Proceed.
14. **Term of Contract:** The initial term of this agreement shall begin on July 1, 2025, and continue for a period of one year through June 30, 2026. Thereafter, this agreement may be renewed for two additional one-year renewal terms (each a "Renewal Term" and together with the Initial Term, the "Term") if the Contractor requests such renewal at least sixty (60) days prior to expiration of the Initial Term or the then-current Renewal Term. If the Contractor fails to request renewal, this Agreement may terminate at the end of the Initial Term or the then-current Renewal Term. This agreement is subject to the multi-year contractual provisions of O.C.G.A. § 36-60-13(a).
15. **Unavailability of Funds:** This contract will terminate immediately and absolutely at such time as appropriated and otherwise unobligated funds are no longer available to satisfy the obligations of the County under the contract.
16. **Payment Terms:** The County's standard payment terms are Net 30. Any deviation from standard payment terms must be specified in the awarded contract, and both parties must agree on such deviation.
17. **Severability:** The invalidity of one or more of the phrases, sentences, clauses, or sections contained in the contract shall not affect the validity of the remaining portion of the contract. If any provision of the contract is held to be unenforceable, then both parties shall be relieved of all obligations arising under such provision to the extent that the provision is unenforceable. In such case, the contract shall be deemed amended to the extent necessary to make it enforceable while preserving its intent.
18. **Indemnification:** The Contractor shall indemnify and save the County and all its officer, agents and employees harmless from all suits, actions, or other claims of any character, name and description brought for or on account of any damages, losses, or expenses to the extent caused by or resulting from the negligence, recklessness, or intentionally wrongful conduct of the Contractor or other persons employed by or utilized by the Contractor in the performance of the contract. The Contractor shall pay any judgment with cost which may be obtained against the County growing out of such damages, losses, or expenses, but only to the extent such damages, costs and expenses are adjudicated to have been caused by or resulted from the negligence, recklessness, or intentionally wrongful conduct of the Contractor or other persons employed or utilized by the Contractor in the performance of the contract.
19. **Non-Assignment:** Assignment of any contract resulting from this Request for Proposals will not be authorized, except with express written authorization from the County.

20. **Insurance:** The Successful Offeror shall procure and maintain the following insurance, to be in effect throughout the term of the contract, in at least the amounts and limits set forth as follows:

- **General Liability Insurance:** \$1,000,000 combined single limit per occurrence, including bodily and personal injury, destruction of property, and contractual liability.
- **Automobile Liability Insurance:** \$1,000,000 combined single limit each occurrence, including bodily injury and property damage liability.
- **Worker's Compensation:** Workers Compensation as required by Georgia statute.

Before a contract is executed with the Successful Offeror, the Successful Offeror shall provide Certificates of Insurance for all required coverage. The Successful Offeror can provide the Certificate of Insurance after award of the contract but must be provided prior to execution of the contract document by both parties. Certificates shall list an additional insured as follows:

Fayette County, Georgia
140 Stonewall Avenue West
Fayetteville, GA 30214

21. **Termination for Cause:** The County may terminate the contract for cause by sending written notice to the Contractor of the Contractor's default in the performance of any term of this agreement. Termination shall be without prejudice to any of the County's rights or remedies by law.
22. **Termination for Convenience:** The County may terminate the contract for its convenience at any time with 10 days' written notice to the Contractor. In the event of termination for convenience, the County will pay the Contractor for services performed. The County will compensate partially completed performance based upon a signed statement of completion submitted by the Contractor, which shall itemize each element of performance completed.
23. **Force Majeure:** Neither party shall be deemed to be in breach of the contract to the extent that performance of its obligations is delayed, restricted, or prevented by reason of any act of God, natural disaster, act of government, or any other act or condition beyond the reasonable control of the party in question.
24. **Governing Law:** This agreement shall be governed in accordance with the laws of the State of Georgia. The parties agree to submit to the jurisdiction in Georgia, and further agree that any cause of action arising under this agreement shall be required to be brought in the appropriate venue in Fayette County, Georgia.

RFP #2531-P BUSINESS PERSONAL PROPERTY COMPLIANCE AUDITS

Fayette County Government requests qualified individuals and firms with experience in auditing Personal Property accounts for compliance to submit proposals for auditing services for the Fayette County Board of Tax Assessors (BTA).

I. INTRODUCTION

Fayette County intends to award one contract pursuant to this RFP for the purpose of providing business personal property audit services. The contract shall be awarded on a per audit fixed-fee basis, with payment rendered upon completion of each audit. The contractor shall defend his or her audit findings throughout the appeals process. The audits performed will provide the BTA with sufficient information to verify the accuracy of business personal property tax reports filed or not filed by Fayette County business taxpayers for up to three years, as appropriate. The scope of services provided shall be consistent with the requirements of O.C.G.A. § 48-5-298, as amended, and the Georgia Appraisal Procedures Manual 560-11-10-08, and in accordance with the policies and procedures adopted by the BTA.

II. STATEMENT OF WORK

The selected firm(s) will be required to perform, under the Chief Appraiser and Personal Property Division Manager's direction, ("Project Manager") at least the following tasks and services:

- A. Audits may be assigned as large blocks of accounts at the beginning and approximately midway through each contract year. This will allow the auditing firm(s) the flexibility to schedule the audits accordingly and best utilize manpower and resources. The auditing firm shall in no way influence or participate in the selection of the accounts to be audited. The auditing firm shall in no way perform an audit on an account which is an entity with which the auditing firm has had a past business relationship outside the scope of the duties performed by the auditing firm under the attached Agreement or any previous agreement with the County. All audits assigned should be scheduled to allow for completion prior to the end of each contract year ending on June 30 with new accounts only assigned after the initial block of audits has been completed. Audits shall be completed and results submitted to the BTA within ninety (90) days from date scheduled by the auditing firm(s). Exceptions shall be submitted in writing to the Project Manager for approval with details of the reasons for delay, except for those exceptions initiated by the Project Manager.

- B. Accounts assigned for audit and cancelled at a later date because of bankruptcies, no longer in business, moved out of county, etc., shall be compensated at the staff hourly rate included in the proposal for actual time spent, up to a maximum of eight (8) hours per account. The charge must be supported with documentation such as time sheets, timecards, etc.
- C. The audits shall be conducted on business personal property accounts for the purpose of ad valorem taxation to ensure complete and accurate reporting. These services will include the examination of taxpayers' personal property tax reports and all supporting documents. The audit will confirm that all fixed assets, including machines and equipment, furniture and fixtures, inventories, and leased equipment are reported consistent with the regulations in effect for the year in which the assets are being reported.
- D. The auditing firm(s) shall be responsible for scheduling appointments with taxpayers and/or their agents.
- E. The audits shall be performed at the taxpayer's Fayette County location, or at the Fayette County BTA office. In addition to reviewing the taxpayer's records during the on-site visit, the auditor shall complete a walk-through of the facilities to observe the operation and condition of the properties being reported. If the taxpayer's records are maintained at a location outside of Fayette County, the auditing firm(s) will make every effort to have the records, or certified copies, available at the Fayette County location at time of the audit, or at the Fayette County BTA office. If records cannot be produced in Fayette County or at the Fayette County BTA office, out of town travel plans must be approved in advance. Out of town travel expenses will be reimbursed according to Fayette County's travel policy in effect at the time out of town travel is approved. If out of town travel is combined for two or more audits, the reimbursed travel expenses will be allocated on a pro rata basis. The BTA may assign employees to accompany the auditor on audits and/or on-site visits as deemed appropriate.
- F. Upon completion of each audit, the auditing firm(s) shall be responsible for computing the valuation of property arising from the audit, which may be subject to tax assessment for the audit period. All valuations shall be determined by the application of BTA rules and regulations in effect for the year being audited. Standard BTA policy and appraisal methodology shall be applied. All authority and final decisions remain with the BTA. The auditing firm(s) shall not attempt to negotiate factual valuation disputes unless authorized by BTA management.
- G. The auditing firm(s) shall verbally discuss audit results with the taxpayer and/or their agent prior to submitting the final results in writing to the taxpayer and the BTA.

- H. The auditing firm(s) shall prepare all necessary correspondence in an electronic format using standard form letters approved by the BTA applicable to the services provided. The electronic formats shall be forwarded to the BTA for printing and mailing. All written correspondence to taxpayers shall be on BTA stationery and signed by the Personal Property Division Manager. The auditing firm(s) may assist the BTA in the preparation of other correspondence to taxpayers as deemed necessary by the Personal Property Division Manager. At no time will the auditing firm(s) have in its possession any BTA stationery, blank letterheads, or preprinted envelopes.
- I. The auditing firm(s) shall prepare and submit, at regularly scheduled quarterly meetings separate detailed progress reports for "Audits - Outstanding" and "Audits – Completed." The "Audits - Outstanding" report shall include, but not be limited to, the following items: taxpayers' name, account number, location address, contact name and phone number, date assigned, audit issues, findings, and outstanding issues. Any issues that will potentially delay completion of the audit shall be brought to the attention of the Project Manager immediately. The "Audits - Completed" report should include all of the above with the addition of the final assessment based on the audited results as compared to original reported fair market values. Please include suggested examples with your proposal.
- J. The auditing firm(s) shall defend its audit findings at each step of the appeals process until a final settlement has been reached.
- K. The auditing firm(s) shall commit to comply with a "Confidentiality Statement" (Attachment A, Exhibit A) and a "Conflict of Interest and Contingency Fee Statement" (Attachment A, Exhibit B), for the duration of the assigned audits.
- L. The auditing firm(s) agrees that all work performed shall be in accordance with Generally Accepted Accounting Principles as adopted by the American Institute of Certified Public Accountants

III MINIMUM QUALIFICATIONS FOR STAFF

To be considered for selection, the firm and employees shall meet or exceed the following minimum qualifications:

1. Auditing firm shall have an individual holding a CPA designation and licensed to practice in the State of Georgia, with a minimum of three-years related experience.
2. Minimum qualifications of staff members performing the audits are as follows:
 - a. Accounts with an annual Fair Market Value of \$1,000,000 or greater shall be completed by an individual holding a CPA designation and licensed to practice in the State of Georgia, with a minimum of three years related experience.
 - b. Accounts with an annual Fair Market Value under \$1,000,000 shall be performed by professionals with an accounting degree whose work is supervised and reviewed by a CPA licensed to practice in the State of Georgia

IV. PROPOSAL RESPONSE REQUIREMENTS

Completed submittals must include the following, preferably in the order shown.

1. **Cover Letter:** Include the Request for Proposals number {#2531-P} and title (*Business Personal Property Compliance Audits*).
2. **Table of Contents**
3. **Required Documents:**
 - a. Company Information Page
 - b. Contractors Affidavit under O.C.G.A. § 13-10-91(b)(1)
 - c. Confidentiality Statement (Attachment A, Exhibit A)
 - d. Conflict of Interest and Contingency Fee Statement (Attachment A, Exhibit B)
 - e. Price Proposal (Attachment B)
 - f. Signed addenda, if any are issued
 - g. Copy of State CPA license

Note: Price proposals are to be enclosed in a separate sealed envelope, as specified in the Terms and Conditions, Section #3.

4. **Project Understanding and Audit Program Implementation:**

- a. **Audit Work Plan** - Detail the proposed audit plan and list the significant tasks, methodologies, and responsibilities in order of completion. Include information on suggested scheduling or audit calendars, and expected number of accounts that could be audited. Also include examples of management reports and sample correspondence to be used with Fayette County taxpayers.
- b. **County Support** - Provide estimates of resources to be provided by Fayette County to include, but not be limited to, space, equipment, administrative and clerical support, and management.
- c. **Training** - Describe the training program you offer. In your proposed hourly fee, include "routine" county staff training, as well as possible development, if requested by the county, of a formal training program for BTA staff or a program for discovery of new and previously unreported taxpayers.

5. **Company's Background and Experience:**

In order to protect Fayette County from untimely delays, auditing firms responding to this RFP shall provide the following information to demonstrate corporate experience and ability to complete complex auditing projects of this nature. If the firm wishes to identify any of their information as confidential, it must be placed in a separate, sealed envelope and otherwise treated in conformity with Georgia Code O.C.G.A. § 50-18-72, as specified in the Terms and Conditions to this RFP, in the section titled *Trade Secrets - Confidentiality*. This may allow Fayette County to maintain confidentiality of each firm's financials and at the same time comply with an "Open Records" request.

- a. Existing Clients of Relative Size - Please include a reference name and telephone number for verification. The county reserves the right to contact any of the listed entities for reference purposes.
 - (1) Summarize a list of clients of relative size for past five years from all jurisdictions, including other states.
 - (2) Indicate length of time for each association.
 - (3) Indicate number of audits completed on an annual basis for each jurisdiction.
 - (4) List and explain any litigation during the past five years.
 - (5) Explain any contracts with other governmental agencies that were terminated prior to the end of the contract period.

b. Twelve- (12) Month Business Plan:

- (1) Demonstration of your company's capability to financially support this program, including cash flow projections.
- (2) Pro forma financial statements (balance sheet and income statement). Audited or certified financial statements for 2023 and 2024, or the latest two years available, shall be submitted with your proposal.

6. Project Team/ Staffing Plan:

Please include the following for consideration by Fayette County:

- a. Chart of Principals within your organization from Project Managers up, to include names, positions, years' experience with your company, and any other experience deemed appropriate.
- b. Resumes of persons who will be assigned to this contract for project auditing, project management, and executive management. Include the approximate time commitment of each individual to this contract.
- c. Availability of existing staff, to include an organizational chart detailing the proposed team for Fayette County.
- d. Identify the Team member(s) who hold a CPA designation, are licensed to practice in the State of Georgia, and have a minimum of three years related experience.
- e. Additional Staffing Requirements to show plans for any proposed additional staffing (Due to concerns of confidentiality, no subcontracting will be considered.)

7. **Customer Service** - Fayette County is committed to providing its taxpayers with the highest level of Customer Service possible. Outline your firm's policies and procedures for maintaining this high level of Customer Service while representing Fayette County to its taxpayers.

8. **Price Schedule:** Price schedules shall be submitted in an additional sealed, opaque envelope, identified as the price schedule, and enclosed in the sealed envelope with the proposal, as specified in the Terms and Conditions, in the section titled *Submission of Offers*.

- a. See Attachment B for the Price schedule format.
- b. Fair Market Value and Account Class will be determined as follows:
 - (1) The FMV will be the highest value reported by the taxpayer prior to the audit for any year selected for audited.
 - (2) The Account Class will be determined at the time the account is selected for audit and will not be adjusted as a result of the audit findings.
 - (3) Approved exemptions, such as Freeport for Inventory and Community Development Projects, will be added to the taxable FMV to determine the total value of the account for Account Class purposes.
- c. An audit usually consists of the most current year and two (2) prior years. However, prior year financial records are not available in all cases for auditing purposes; therefore some audits consist of less than three (3) years. For pricing purposes, the Account Class based on FMV has been divided into two (2) categories: "1 year audits" and "2 or 3 year audits".
- d. Price Schedule shall include proposed hourly fees for training, discovery of new & previously unreported taxpayers, and time spent on audits that may be cancelled prior to completion, if such services are requested by the county.

V. EVALUATION PLAN

Technical Merit: An Evaluation Committee will review and evaluate proposals. The points earned for technical merit will comprise 70% of your evaluation score. Criteria for technical merit are explained in Section IV above and are, in priority order, as follows:

	<u>Max Points</u>
1. Project understanding and audit program implementation	30
2. Company's background and experience	15
3. Project Team/ Staffing Plan	15
4. Customer Service	10

Maximum Points - Technical Merit 70

Pricing: The remaining 30% of your score will be determined by your proposed price, as compared to other responding entities. Proposed prices will be assigned points earned through use of a "variance" weighting method. The lowest proposed price will earn the maximum number of points for the Pricing portion of the score. Other proposals' price scores will be calculated based on the variance of their prices from the lowest proposed price.

Presentations: The county may at its discretion, choose one or more of the best-scoring companies to make in-person presentations. If more than one company makes a presentation, the Evaluation Committee will evaluate the presentations, and score up to an additional 20 points to be added the technical score for each company that makes a presentation

COMPANY INFORMATION
RFP# 2531-P: Business Personal Property Compliance Audits

A. COMPANY

Company Name: _____

Physical Address: _____

Mailing Address (if different): _____

Website (if applicable): _____

B. AUTHORIZED REPRESENTATIVE

Signature: _____

Printed or Typed Name: _____

Title: _____

E-mail Address: _____

Phone Number: _____ Fax Number: _____

C. PROJECT CONTACT PERSON

Name: _____

Title: _____

Phone Number: _____

E-mail Address: _____

Contractor Affidavit under O.C.G.A. § 13-10-91(b)(l)

The undersigned contractor ("Contractor") executes this Affidavit to comply with O.C.G.A § 13-10-91 related to any contract to which Contractor is a party that is subject to O.C.G.A. § 13-10-91 and hereby verifies its compliance with O.C.G.A. § 13-10-91, attesting as follows:

- a) The Contractor has registered with, is authorized to use and uses the federal work authorization program commonly known as E-Verify, or any subsequent replacement program;
- b) The Contractor will continue to use the federal work authorization program throughout the contract period, including any renewal or extension thereof;
- c) The Contractor will notify the public employer in the event the Contractor ceases to utilize the federal work authorization program during the contract period, including renewals or extensions thereof;
- d) The Contractor understands that ceasing to utilize the federal work authorization program constitutes a material breach of Contract;
- e) The Contractor will contract for the 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(a), (b), and (c);
- f) The Contractor acknowledges and agrees that this Affidavit shall be incorporated into any contract(s) subject to the provisions of O.C.G.A. § 13-10- 91 for the project listed below to which Contractor is a party after the date hereof without further action or consent by Contractor; and
- g) Contractor acknowledges its responsibility to submit copies of any affidavits, drivers' licenses, and identification cards required pursuant to O.C.G.A. § 13-10-91 to the public employer within five business days of receipt.

Federal Work Authorization User Identification Number

Date of Authorization

Name of Contractor

#2531-P: Business Personal Property
Compliance Audits
Name of Project

Fayette County, Georgia

Name of Public Employer

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

Executed on _____, _____, 2025 in _____ (city), _____ (state).

Signature of Authorized Officer or Agent

Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME

ON THIS THE _____ DAY OF _____, 2025.

NOTARY PUBLIC

My Commission Expires: _____

CONFIDENTIALITY STATEMENT

- (1) The auditing firm agrees that neither it nor any of its employees, agents, or other persons or organizations over which it has control, will at any time during or after its relationship with BTA, directly or indirectly use any taxpayer's confidential information for any purpose not associated with BTA's activities. The auditing firm also agrees not to disseminate or disclose any of the confidential information to any person or organization not connected with BTA, without the express written consent of BTA. Additionally, the auditing firm agrees to take necessary and appropriate steps to ensure that the confidentiality of all information, considered to be confidential, is maintained while in its possession.
- (2) Upon termination of its relationship with BTA, the auditing firm agrees that all documents, records, notebooks, and similar repositories of or containing confidential information, including copies of such materials, then in its possession, whether prepared by it or others, will be returned to BTA within thirty (30) days of the termination or expiration of this agreement.
- (3) In the event that the auditing firm shall breach this nondisclosure agreement, or in the event that such breach appears to be an imminent possibility, the BTA shall be entitled to all legal and equitable remedies afforded it by law as a result of the breach.
- (4) To the extent that any information is subject to the Open Records Act, BTA and the auditing firm will make those records available to the public.
- (5) This statement is binding upon the auditing firm and upon its respective executors, employees, administrators, legal representatives, successors, and assigns.
- (6) This statement shall be governed for all purposes by the laws of the State of Georgia. If any provision is declared void, or otherwise unenforceable, that provision shall then be deemed to have been severed from this statement, which shall otherwise remain in full force and effort.

I (we) the undersigned agree to comply with the provisions set forth above. On behalf of the
CONTRACTOR:
(Auditing Firm)

Signature of Authorized Representative

Print Name and Title

Notary _____

CONFLICT OF INTEREST AND CONTINGENCY FEE STATEMENT

(1) Contractor certifies that to the best of its knowledge no circumstances exist which will cause a conflict of interest in performing the services required by this contract; that no employee of the County, or any member thereof, or any public agency or official affected by this contract has any pecuniary interest in the contract; and that no person associated with the contractor has any interest that would conflict in any manner or degree with the performance of this contract.

(2) Should the contractor become aware of any circumstances that may cause a conflict of interest during the term of this contract, the contractor shall immediately notify BTA. If BTA determines that a conflict of interest exists, BTA may require the contractor to take action to remedy the conflict of interest or terminate the agreement without liability. BTA shall have the right to recover any fees paid for services rendered by the contractor that were performed while a conflict of interest existed and the BTA was not notified within one- (1) week of becoming aware of the existence of the conflict of interest.

(3) Contractor warrants that it has not employed or retained any company or person other than a bona fide employee working solely for the Contractor to solicit or secure this Agreement; and that he has not paid or agreed to pay any person(s), company, corporation, individual, or firm other than a bona fide employee working solely for the Contractor, any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award of this Agreement. For any breach or violation of this provision, the County shall have the right to terminate the Agreement without liability and at its discretion to deduct from the price, or otherwise recover, the full amount of such fee, commission, percentage, gift, payment, or consideration.

I (we) the undersigned agree to comply with the provisions set forth above. On behalf of the

CONTRACTOR:

(Auditing Firm)

Signature of Authorized Representative

Print Name and Title

Notary _____

ATTACHMENT B

**RFP #2531-P: Business Personal Property Compliance
Audits Price Schedule**

<u>Fair Market Value</u>	<u>Account Class</u>	<u>Hourly Rate</u>	<u>Extended Price</u>
A. AUDITS			
\$1.00 - \$49,999			
1 Year Audit Fee	A		\$ _____
2 or 3 Year Audit Fee	A		\$ _____
\$50,000 - \$399,999			
1 Year Audit Fee	B		\$ _____
2 or 3 Year Audit Fee	B		\$ _____
\$400,000 - \$999,999			
1 Year Audit Fee	C		\$ _____
2 or 3 Year Audit Fee	C		\$ _____
\$1,000,000 - \$4,999,999			
1 Year Audit Fee	D		\$ _____
2 or 3 Year Audit Fee	D		\$ _____
\$5,000,000 - \$19,999,999			
1 Year Audit Fee	E		\$ _____
2 or 3 Year Audit Fee	E		\$ _____
\$20,000,000 & Over			
1 Year Audit Fee	F		\$ _____
2 or 3 Year Audit Fee	F		\$ _____

Estimated # Hours

B. ADDITIONAL SERVICES			
Training	80	\$ _____	\$ _____
Discovery	80	\$ _____	\$ _____
Incomplete Audits	80	\$ _____	\$ _____
C. TOTAL			\$ _____

NOTES:

Responding firms must submit price proposals in this format only.
All fees must be expressed as a per-audit fixed-fee basis, to include all local travel, meetings, profit & overhead, and all related expenses.

COMPANY NAME: _____