



## **Catoosa County, Georgia**

# **REQUEST FOR QUALIFICATIONS**

## **Broker Services**

Issue Date: September 23, 2026

**ALL SUBMISSIONS ARE DUE AT THE ADDRESS BELOW NO LATER THAN**

**Thursday, October 22, 2026, at 2:00 P.M.**

**Catoosa County Board Of Commissioners  
800 Lafayette Street  
Ringgold, GA 30736  
706-965-2500**

## Section 1: GENERAL OVERVIEW

### A. PURPOSE

Catoosa County Board of Commissioners is issuing this Request for Qualifications (RFQ) to seek qualified brokers to assist with strategically planning, designing, and negotiating the best coverage and cost for selective employee benefit programs. The County has approximately 430 full-time, benefits eligible employees. Our leadership is looking to ensure we have financially competitive and affordable benefit programs to offer our employees.

The County does not guarantee a minimum value for this contract.

**This RFQ is not an authorization to approach insurers or other underwriting sources on behalf of the County. We specifically request that no insurance market contact or solicitation be made on behalf of Catoosa County at this time and that no insurance market reservations or commitments be made for any purpose in regards to any insurance or reinsurance to be provided for the County.**

### B. INFORMATION TO VENDORS

#### 1. RFQ TIMETABLE

The anticipated schedule for the RFQ is as follows:

|                                                                                                                                    |                                            |
|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|
| RFQ Released                                                                                                                       | Wednesday, September 23, 2026              |
| Pre-Bid Conference Meeting                                                                                                         | None                                       |
| Deadline for questions to Catoosa County to <a href="mailto:bidquestions@catoosacountyga.gov">bidquestions@catoosacountyga.gov</a> | Friday, October 16, 2026 @ 12:00pm         |
| Submission Deadline                                                                                                                | <b>Thursday, October 22, 2026 @ 2:00pm</b> |
| Tentative Interview for Finalists                                                                                                  | Monday, November 9, 2026                   |
| Tentative Award Date                                                                                                               | Tuesday, November 17, 2026                 |

#### 2. QUALIFICATIONS SUBMISSION

One (1) original, One (1) digital copy on a thumb drive, and Two (2) copies of the complete signed submittal must be received by Thursday, October 22, 2026, at 2:00pm Eastern Standard Time. Qualifications must be submitted in a sealed envelope stating on the outside, the vendor's name, address, "2026-21 BROKER SERVICES RFQ". Please use the cover sheet provided.

**Submitted to:**

**Josh Smith, Projects Administrator  
Catoosa County Board of Commissioners  
800 Lafayette Street  
Ringgold, GA 30736  
706-965-2500**

Any questions related to this Request for Qualifications shall be directed to the following contact person. No contact is to be made with any employee of Catoosa County. Such contact may result in disqualification from the proposal process. Questions must be written and emailed to: Bid Questions: email: [bidquestions@catoosacountyga.gov](mailto:bidquestions@catoosacountyga.gov) no later than Friday, October 16, 2026, at noon. Addendum or Q&A will be issued on Monday, October 19, 2026, on the County website: [www.catoosacountyga.gov/bids](http://www.catoosacountyga.gov/bids). **It is the sole responsibility of the Proposer to look at the website and include any addenda in their package.**

Hand delivered copies may be delivered to the above address ONLY between the hours of 8:00 AM and 4:30 PM EST, Monday through Friday, excluding holidays observed by the Catoosa County Government. For a complete listing of holidays please visit [www.catoosacountyga.gov](http://www.catoosacountyga.gov).

Vendors are responsible for informing any commercial delivery service, if used, of all delivery requirements and for ensuring that the required address information appears on the outer wrapper or envelope used by such service.

The submittal must be signed by a company officer who is legally authorized to enter into a contractual relationship in the name of the vendor.

3. CONTACT PERSON

Vendors are encouraged to contact Bid Questions by email at [bidquestions@catoosacountyga.gov](mailto:bidquestions@catoosacountyga.gov) to clarify any part of the RFQ requirements. All questions that arise prior to the DEADLINE FOR QUESTIONS due date shall be directed to the contact person in writing via email. Any unauthorized contact shall not be used as a basis for responding to this RFQ and also may result in the disqualification of the vendor's submittal.

Vendors may not contact any elected official or other county employee to discuss the bid process or bid opportunities except: 1) through the Projects Administrator named herein, or 2) as provided by existing work agreement(s). This policy shall be strictly enforced, and the County reserves the right to reject the submittal of any vendor violating this provision.

4. ADDITIONAL INFORMATION/ADDENDA

Catoosa County will issue responses to inquiries and any other corrections or amendments it deems necessary in written addenda issued prior to the due date posted on the County's website under the bid information. Vendors should not rely on any representations, statements, or explanations other than those made in this RFQ or in any addendum to this RFQ. Where there appears to be a conflict between the RFQ and any addenda issued, the last addendum issued will prevail. Vendors are advised to check the County's website for addenda before submitting their bids. Addenda will be posted on the website on Monday, October 12, 2026, [www.catoosacountyga.gov/bids](http://www.catoosacountyga.gov/bids)

*Vendors must acknowledge any issued addenda by including Addenda Acknowledgement Form with the submittal. Proposals which fail to acknowledge the vendor's receipt of any addendum will result in the rejection of the offer if the addendum contains information which substantively changes the Owner's requirements.*

5. LATE SUBMITTAL AND LATE MODIFICATIONS

Submittals received after the due date and time will not be considered. Modifications received after the due date will not be considered. Catoosa County Government assumes no responsibility for the premature opening of a proposal not properly addressed and identified, and/or delivered to the proper designation.

6. REJECTION OF PROPOSALS/CANCELLATION

Catoosa County Government reserves the right to reject any and all submittals and reserves the right to waive irregularities or informalities in any submittal or in the submittal procedure, when to do so would be to the advantage of Catoosa County. Catoosa County reserves the right to cancel this RFQ at any time.

7. MINIMUM RFQ ACCEPTANCE PERIOD

Submittals shall be valid and may not be withdrawn for a period of 90 days from the date specified for receipt of submittals.

8. NON-COLLUSION AFFIDAVIT

By submitting a response to this RFQ, the vendor represents and warrants that such proposal is genuine and not a sham or collusive or made in the interest of or on behalf of any person not therein named and that the vendor has not directly or indirectly induced or solicited any other vendor to put in a sham proposal, or any other person, firm or corporation to refrain from submitting and that the vendor has not in any manner sought by collusion to secure to that vendor any advantage over any other vendor.

By submitting a proposal, the vendor represents and warrants that no official or employee of Catoosa County Government has, in any manner, an interest, directly or indirectly in the proposal or in the contract which may be made under it, or in any expected profits to arise there from.

9. COST INCURRED BY VENDORS

All expenses involved with the preparation and submission of the RFQ to the Catoosa County Board of Commissioners, or any work performed in connection therewith is the responsibility of the vendor(s).

10. RFQ OPENING

Only the names of the firms responding to this RFQ will be disclosed due to the fact that the proposals will be subject to an evaluation review for accurate qualifications. A list of firms responding to the RFQ may be obtained from the County's website [www.catoosacountyga.gov](http://www.catoosacountyga.gov) after the RFQ due date and time stated herein.

11. OPEN RECORDS

All materials submitted in connection with the RFQ will be public documents and subject to the Open Records Act and all other laws of the State of Georgia, the United States of America, and the open records policies of Catoosa County Board of Commissioners. All such materials shall remain the property of Catoosa County and will not be returned to the respondent.

12. TAXES

Catoosa County Government is tax exempt. No sales tax will be charged on any products or services. Catoosa County cannot exempt any other person/vendor from applicable sales taxes that may be required of them in relation to this project. Selected vendor will be provided with Catoosa County's Sales and Use Tax Certificate of Exemption number upon request.

13. VENDOR INFORMATION

All submissions shall include a completed vendor information form, current copy of business license and current W-9. Failure to provide this information could result in the disqualification of the vendor from submitting a proposal.

14. INSURANCE

Selected vendor will be required to provide Catoosa County with a Certificate of Insurance for liability and workers compensation insurance before work can begin on this County project and be effective for the duration of the work as described in the contract documents, including authorized change orders, plus any period of guarantee as required in the general warranty. General liability insurance should be at least one million dollars (\$1,000,000) combined single limit per occurrence. Professional liability insurance should be at least one million dollars (\$1,000,000) per occurrence and \$2 or \$3 million aggregate. Automobile insurance should be at least one million dollars (\$1,000,000) combined single limit per accident for bodily injury or property damage, and Workers Compensation insurance should be as required by the State of Georgia.

## 15. ANTI-DISCRIMINATION

Catoosa County, in accordance with Title VI of the Civil Rights Act of 1964, 42 U.S.C. 2000d TO 2000d-4 and Title 49, code of Federal Regulations, Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally-assisted programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises as defined at 49 CFR Part 23 will be afforded full opportunity to submit bids in response to this Request for Qualifications and will not be discriminated against on the grounds of race, color, national origin, sex, handicap/disability in consideration of an award.

By submitting their bids, all bidders certify to Catoosa County that they will conform to the provision of the Federal Civil Rights Act of 1964. In every contract of over \$10,000 the provisions in 1 and 2 below apply:

1. During the performance of this contract the contractor agrees as follows:
  - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, or national origin, except where religion, sex or national origin is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
  - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor 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.
2. The contractor will include the provisions of 1 above in every subcontract or purchase order of over \$10,000 so that the provisions will be binding upon each subcontractor or vendor. The proposal process will be a two-part process. Proposers will submit first round proposals by the date indicated in Section 1.

## 16. GEORGIA SECURITY AND IMMIGRATION COMPLIANCE ACT

Vendors submitting a Qualification package in response to this RFQ must provide the following information in the package to indicate compliance with the Georgia Security and Immigration Compliance Act. The form is provided for completion.

- A. A statement that indicates the contractor will conduct itself in compliance with O.C.G.A. §13-10-91 and Rule 300-10-.02 in the execution of the contract.
- B. By completing the affidavit that is provided with this solicitation, the vendor is attesting to the following:
  - a. The affiant has registered with and is authorized to use the federal work authorization program.
  - b. The user identification number and date of authorization for the affiant.
  - c. The affiant is using and will continue to use the federal work authorization program throughout the contract period.
  - d. Any employee, contractor or subcontractor of such contractor or subcontractor shall also be required to satisfy the requirements set forth in this paragraph; and
  - e. Upon contracting with a new subcontractor, a contractor or subcontractor shall notify Catoosa County and shall deliver a completed Subcontractor Affidavit to Catoosa County within five (5) working days of entering into a contract or agreement of hire with the subcontractor before the new subcontractor begins any work.
- C. Failure to provide the completed and notarized affidavit with the contractor's proposal will result in immediate disqualification as required by the Georgia Security and Immigration Compliance Act.

## SECTION II – GENERAL CONDITIONS

### A. CONTRACT PERIOD

The initial term of a contract awarded as a result of this RFQ shall be from Monday, January 18, 2027, through Monday, January 17, 2028. The contract may be renewed according to the terms stated herein for two (2) additional one (1) year periods.

The contract shall terminate absolutely and without further obligation at such time as appropriated and otherwise unobligated funds are no longer available to satisfy the obligations of the County under this contract. The County does not guarantee a minimum value for this contract.

If, at any time, the County determines it is in its best interest to discontinue use of these services the County reserves the right to cancel the Agreement by giving thirty (30) days' advance notice.

### B. SCOPE OF WORK

Provisions of brokerage services to Catoosa County under any agreement ensuing from this proposal will entail the following, at a minimum:

1. Assist with annual benefits renewals, including marketing the County's desired insurance package through identification of appropriate markets, analysis of proposals, providing recommendations, and assistance in negotiation of changes in contracts with insurance providers
2. Prepare, disseminate, and analyze bid packages in accordance with County specifications, should formal bidding package for quality of benefits be deemed necessary
3. Contribute to the development of objectives and initiatives through strategic planning
4. Advise the County regarding plan design issues, quality of benefits provided, plan management, wellness, potential cost savings, cost effectiveness, and reducing health plan expenditures while retaining a competitive benefits program
5. Evaluate various insurance products submitted for consideration by carriers, agents, and brokers
6. Monitor ongoing contracts, including third party administrators, to ensure contract compliance
7. Audit contracts for accuracy of coverage, terms, and conditions
8. Analyze claims history and insurance utilization at least quarterly
9. Provide information on employee benefit issues, trends, and proposed or new legislation
10. Competitively market stop loss annually or other lines of coverage, as needed
11. Communicate information regarding changes in statutes, rules, and regulations regarding our responsibility under federal and state laws, the Affordable Care Act (ACA), the management of benefits and the self-funded plan
12. Review benefit plan documents, including summary plan descriptions, contracts, employee summaries, and policies/procedures ensuring plan documents are made available to the County
13. Manage plan changes with vendors as necessary
14. Provide leadership and management of carrier relationships
15. Review, coordinate, and implement Client agreed upon plan "best practices" to help limit plan liability and increase participant satisfaction
16. Identify opportunities for streamlining and improving administration procedures
17. Provide custom open enrollment and new employee orientation benefit planners and/or bulletins and other communications pertaining to the health and wellness program
18. Facilitate open enrollment with in-person meetings, attend benefits fair(s), provide webcasts (recorded or live)
19. Assist and consult in the design and implementation of an employee wellness program
20. Meet with County administrative staff as needed
21. Provide a key contact person to be available to answer questions and resolve issues that arise during the year regarding employee benefits, contract administration, and service provisions
22. Single billing services
23. COBRA Administration
24. Perform other related consultation services as needed or requested
25. Provide County with all renewal quotes in addition to a quote/bid tabulation
26. Provide County with FIRM renewal numbers well in advance of the renewal deadline to allow for BOC approval prior to open enrollment

## C. STATEMENT OF QUALIFICATIONS

### **Broker Proposal Questionnaire:**

The Broker Proposal Response Questionnaire must clearly demonstrate the required qualifications, expertise, competence, and capability of the vendor. Please provide a concise description of your firm's ability to provide the services required in the Scope of Work of this document. Additionally, please include the answers to the following questions (address each by number):

1. Describe your organizational structure (i.e., publicly held corporation, partnership, etc.). Review each area of your organization and describe their function. Describe the process for handling concerns/questions/calls from client staff and employees.
2. Confirm that you are a licensed broker in the State of Georgia and provide documentation. Confirm that you serve as a broker independently and are not employed by any insurance company, third party administrative agency or provider network.
3. Briefly describe your company's organization, philosophy, and management. Also, please provide a brief company history.
4. Describe your contractual relationship, if any, with organizations or entities necessary to your proposal's implementation (i.e., actuarial services, data information services, third party providers for Open Enrollment, etc.).
5. How long has your organization been providing brokerage services? Has your organization ever operated under a different name? Why was the name changed?
6. Provide a list of known complaints filed with the Insurance Commissioner's Office, against your firm, over the past ten (10) years. Include the nature of the complaint and disposition.
7. Provide a list of public sector clients your firm currently represents and indicate if they are fully or partially self-funded or fully insured.
8. Indicate the method of service provision your organization would utilize in implementing your proposal (i.e., individual broker, individual broker with supporting back up, team of brokers). Please provide resumes of individual brokerage staff that would provide services to the County. Include a brief professional history for each individual and how they are qualified to provide service to Catoosa County.
9. Briefly describe the level of service and support provided to Catoosa County by your broker(s) on a day-to-day basis. Describe the level of service and support by your staff on a day-to-day basis. Are your customer service employees licensed insurance agents and are they certified under COBRA and HIPAA?
10. How does your firm provide continuing education to ensure that each broker is educated on current market trends and legislative developments? How is this information communicated to your clients?
11. Describe how you build an understanding of the direction and priorities of the County employee benefit program and how you would utilize this information to recommend changes and project future trends.
12. Detail how your organization assists clients in developing a strategic benefit plan.
13. Describe your organization's anticipated involvement in the annual renewal process. Include information regarding process timeframes, negotiation of rates and vendor selection. NOTE: Catoosa County's current plan year for health and dental insurance is July 1<sup>st</sup> to June 30<sup>th</sup>.
14. Discuss any innovative mechanisms you have used to minimize insurance and service costs to your clients.

15. How do you keep your clients aware of trends and new developments in employee benefits?
16. How does your firm assist Catoosa County in developing plan specifications? Explain your process for providing plan recommendations to your clients.
17. Explain the process your organization would utilize to assist Catoosa County in selecting an insurance vendor. How would your company's experience and expertise benefit the County in this process?
18. Please provide a list of vendors you have relationships with in regard to health, disability, life, supplemental health, and dental insurance plans. Describe your preferred carrier relationships and the benefits of these relationships to your clients. Describe any blocks or pools of business that your firm has access to and what benefits are to your clients.
19. Describe how your organization strives to streamline benefit administration for your clients. Include any services you provide for automation of the benefit process (i.e., electronic capabilities, outsourcing options). How many of your clients are enrolled online? How many employees does this represent? Does your staff build these enrollment websites? Attach any associated cost for these services on a separate fee schedule.
20. Describe process for Open Enrollment for client staff and its employees.
21. Detail how you develop a benefit communication strategy with your clients. Include what tools or resources you have available to assist your clients in effective communications not only the specific plan details but also the value of the benefits offered.
22. What training resources does your organization provide to assist your clients in education and training their employees?
23. Describe your services. What resources does your organization utilize to answer compliance questions from your clients? List three recent compliance questions and show the format and content of your response.
24. Please provide a case study on a recent client that has begun working with your firm in the past three years and show the financial impact on claims that your firm has made through benefit consulting. Describe your recommendation and how these are related to the financial impact on their plan.
25. What makes your organization unique from the other organizations that may submit proposals for the County's consideration?
26. Provide any additional information regarding your organization or services that you feel would be beneficial in helping the County to select a benefits broker.
27. Please provide a list of four verifiable public sector references, all of whom are able to comment of your organization's relevant experience. Please furnish:  
  
Group Name; Contact name and telephone number;  
Services you provided; Time period covered;  
Benefit programs addressed; and number of covered employees.
28. List any and all accounts held by local governments (city and county) in Georgia within the last five (5) years. If any, do you still hold that account? If no, why not? If no Georgia local governments, indicate so.

**Pricing:**

It is Catoosa County's expectation that brokerage fees and commissions will be borne by the selected insurance provider. If additional brokerage fees are expected of Catoosa County, or if your firm offers additional fee- supported services which are supplemental to your proposal, please clearly outline such costs and services on a separate fee addendum at the end of the proposal in a separate, sealed envelope clearly identified as "Financial Proposal."

**Oral Presentations:**

During the evaluation process, Catoosa County may at its discretion, request oral presentations from any or all respondents for the purpose of clarification or amplifying the materials presented. However, respondents are cautioned that the County is not required to request clarification; therefore, all proposals should be complete and reflect the most favorable terms available from the broker.

**Criteria for Evaluation:**

All proposals will be evaluated according to, but not necessarily limited to, the following:

Your firm's indicated ability to provide a level of service sufficient to meet the County's needs, as stated in your response to *Scope of Work* and *Broker Proposal Questionnaire*.

1. Extent and success of previous work your firm has provided to organizations similar in nature and size to Catoosa County.
2. The proposal itself as an example of your firm's work product.
3. Qualifications/experience of key personnel to be assigned to the project as stated in 8 of Broker Proposal Questionnaire.
4. Adherence to RFQ requirements, including: completion of all required forms; provision of all requested information; adequacy of responses, and return of the RFQ by the stated deadline.

The following point system will be utilized to help evaluate proposals:

| Criteria                                                                  | Point Allowed   |
|---------------------------------------------------------------------------|-----------------|
| Experience (History of working with Public Entities)                      | 10 points total |
| Consulting (Perceived ability to negotiate benefits programs)             | 10 points total |
| Technology (Capabilities of online support)                               | 10 points total |
| Service Model (Ability of upfront & ongoing support)                      | 20 points total |
| Implementation (Approach to service, enrollment & ongoing mgmt.)          | 20 points total |
| Compliance Resources (Inform of current & legal updates)                  | 10 points total |
| Responsiveness of understanding scope (Accurately completing our request) | 10 points total |
| Providing References                                                      | 10 points total |

**D. ADMINISTRATION**

The project will be administered by the Catoosa County Board of Commissioners with the Catoosa County Human Resources Director being the main point of contact for all questions during the term of the contract.

**E. BIDDER'S CHECKLIST – REQUIRED FORMS**

Each proposal should be prepared simply and economically, avoiding the use of elaborate promotional materials beyond those sufficient to provide a complete presentation. The cost for developing the submittal is the sole responsibility of the respondent. The following documents are also required to be included in your proposal packet:

**REQUIRED FORMS:**

Documentation that is required for a complete proposal includes:

1. Documentation listed under Section D: Statement of Qualifications
2. Vendor Information Form
3. Execution of Proposal Form
4. Addenda Acknowledgement Form (If applicable)
5. Proposer's Certification and Non-Collusion Affidavit
6. Georgia Security and Immigration Compliance Act Affidavit
  - i. Contractor Affidavit
7. Completed W-9
8. Copy of current business license

9. Copy of current Georgia Insurance Brokerage license
10. Proof of Insurance (Liability and Workers Compensation) – Sample document may be given at time of RFQ submittal. Once the contract is awarded, vendor must provide a Certificate of Liability Insurance and a copy of the insurance policy naming Catoosa County as an additionally insured.

#### F. PROCEDURES AND MISCELLANEOUS ITEMS

1. All questions must be submitted in writing (e-mail is acceptable) and shall be communicated in the form of an addenda if the scope specifications are to be affected and posted on the County's website under bid information. All firms responding to this RFQ should check the website on Monday, October 12, 2026, before responding to this RFQ.
2. All respondents to this RFQ shall indemnify and hold harmless the Catoosa County Board of Commissioners, and any of their officers and employees from all suits and claims alleged to be a result of this RFQ. The issuance of this RFQ constitutes only an invitation to present a proposal. It does not constitute an Invitation to Bid nor does it commit the County to issuing an Invitation to Bid. The Catoosa County Board of Commissioners reserves the right to determine, at its sole discretion, whether any aspect of a respondent's submittal meets the criteria in this RFQ. The Catoosa County Board of Commissioners also reserves the right to seek clarifications, to negotiate with any vendor submitting a response, to reject any or all responses with or without cause, and to modify the procurement process and schedule. In the event that this RFQ is withdrawn or the project canceled for any reason, the Catoosa County Board of Commissioners shall have no liability to any respondent for any costs or expenses incurred in connection with this RFQ or otherwise.
3. This RFQ is subject to the provisions of the Catoosa County Purchasing Policy and any revisions thereto, which are hereby incorporated into this RFQ in their entirety except as amended or superseded herein.
4. Failure to submit all the mandatory forms from this RFQ package shall be just cause for the rejection of the qualification package. However, Catoosa County reserves the right to decide, on a case by case basis, in its sole discretion, whether or not to reject such a bid as non-responsive.
5. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment less than 30 days, however.
6. In case of failure to deliver goods in accordance with the contract terms and conditions, Catoosa County, after due oral or written notice, may procure substitute goods or services from other sources and hold the contractor responsible for any resulting additional purchasing and administrative costs. This remedy shall be in addition to any other remedies which Catoosa County may have.
7. By submitting a qualification package, the vendor is certifying that they are not currently debarred from bidding on contracts by any agency of the State of Georgia, nor are they an agent of any person or entity that is currently debarred from submitting bids on contracts by any agency of the State of Georgia.
8. Any contract resulting from this RFQ shall be governed in all respects by the laws of the State of Georgia and any litigation with respect thereto shall be brought in the courts of the State of Georgia. Then contractor shall comply with applicable federal, state, and local laws and regulations.
9. It is understood and agreed between the parties herein that Catoosa County shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.

#### G. BONDS

Bid Bond – not required  
Payment Bond – not required  
Performance Bond – not required

#### H. FINAL SELECTION

Following review of all qualified proposals, selection of a suitable vendor and preliminary contract negotiations, a recommendation will be made to the Catoosa County Board of Commissioners. Following Commission approval, the County will complete contract negotiations. The selected vendor should be prepared to commence working on the employee benefit package immediately following contract execution.

The Catoosa County Board of Commissioners reserves the right to accept the response that is determined to be in the best interest of the County. The County reserves the right to reject any and/or all proposals.

Every vendor submitting a proposal must complete the forms showing compliance with the GEORGIA SECURITY AND IMMIGRATION COMPLIANCE ACT – O.C.G.A. §13-10-90. The forms are provided with this RFQ package.



## 2026-21 BROKER SERVICES RFQ - EXECUTION OF PROPOSAL

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DATE: \_\_\_\_\_

The potential Contractor certifies the following by placing an “X” in all blank spaces:

- \_\_\_\_\_ That this proposal was signed by an authorized representative of the firm.
- \_\_\_\_\_ That the potential Contractor has determined the cost and availability of all materials and supplies associated with performing the services outlined herein.
- \_\_\_\_\_ That all labor costs associated with this project have been determined, including all direct and indirect costs.
- \_\_\_\_\_ That the potential Contractor agrees to the conditions as set forth in this Request for Qualifications with no exceptions.

Therefore, in compliance with the foregoing Request for Qualifications, and subject to all terms and conditions thereof, the undersigned offers and agrees, if this proposal is accepted within sixty (60) days from the date of the opening, to furnish the services for the prices quoted within the timeframe required.

\_\_\_\_\_  
Business Name

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Typed Name & Title

**THIS PAGE MUST BE COMPLETED AND SUBMITTED AS A PART OF YOUR PROPOSAL**



## 2026-21 BROKER SERVICES RFQ - BIDDER REFERENCE FORM

All references must be from customers for whom your company has completed work similar to the specifications of this bid. Attach additional page if necessary.

References for: \_\_\_\_\_  
(Company Name)

|                                                            |                             |
|------------------------------------------------------------|-----------------------------|
| 1. Company                                                 | _____                       |
| Street                                                     | _____                       |
| Address                                                    | _____                       |
| City, State & Zip                                          | _____                       |
| Contact Person Name                                        | _____ Title _____           |
| Phone                                                      | _____ FAX _____ Email _____ |
| Describe Scope of Work and dates of project/service: _____ |                             |
| _____                                                      |                             |
| _____                                                      |                             |
| 2. Company                                                 | _____                       |
| Street                                                     | _____                       |
| Address                                                    | _____                       |
| City, State & Zip                                          | _____                       |
| Contact Person Name                                        | _____ Title _____           |
| Phone                                                      | _____ FAX _____ Email _____ |
| Describe Scope of Work and dates of project/service: _____ |                             |
| _____                                                      |                             |
| _____                                                      |                             |
| 3. Company                                                 | _____                       |
| Street                                                     | _____                       |
| Address                                                    | _____                       |
| City, State & Zip                                          | _____                       |
| Contact Person Name                                        | _____ Title _____           |
| Phone                                                      | _____ FAX _____ Email _____ |
| Describe Scope of Work and dates of project/service: _____ |                             |
| _____                                                      |                             |
| _____                                                      |                             |

**THIS PAGE MUST BE COMPLETED AND SUBMITTED AS A PART OF YOUR PROPOSAL**



## 2026-21 BROKER SERVICES RFQ - ADDENDA ACKNOWLEDGEMENT

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The vendor has examined and carefully studied the Request for Qualifications and the following Addenda, receipt of all of which is hereby acknowledged:

Addendum No. \_\_\_\_\_

Addendum No. \_\_\_\_\_

Addendum No. \_\_\_\_\_

Addendum No. \_\_\_\_\_

\_\_\_\_\_  
Authorized Representative (Signature)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Representative/Title  
(Print or Type)

Vendors must acknowledge any issued addenda. Proposals which fail to acknowledge the vendor's receipt of any addendum will result in the rejection of the offer if the addendum contained information which substantively changes the Owner's requirements.

**THIS PAGE MUST BE COMPLETED AND SUBMITTED AS A PART OF YOUR PROPOSAL**



2026-21 BROKER SERVICES RFQ  
PROPOSER'S CERTIFICATION AND STATEMENT OF NON-COLLUSION

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I \_\_\_\_\_ certify that this proposal is made without prior understanding, agreement or connection with any corporation, firm or person submitting a proposal for the same services and is in all respects fair and without collusion or fraud. I understand that collusive bidding is a violation of state and federal law and can result in fines, prison sentences, and civil damages awards.

I certify that this proposal has been prepared independently and the price submitted will not be disclosed to another person.

I certify that there has been no contact or communication by the proposer or the proposer's associates with any County staff, or elected officials since the date this **2026-21 Broker Services RFQ** was issued except:

1) through the Projects Administration Department 2) at the Pre-Proposal Conference (if applicable) or 3) as provided by existing work agreement(s). **The County reserves the right to reject the proposal submitted by any proposer violating this provision.** I agree to abide by all conditions of this proposal and certify that I am authorized to sign this proposal.

COMPANY NAME: \_\_\_\_\_

\_\_\_\_\_  
Authorized Representative (Signature)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Representative/Title  
(Print or Type)

**THIS PAGE MUST BE COMPLETED AND SUBMITTED AS A PART OF YOUR PROPOSAL**



## 2026-21 BROKER SERVICES RFQ - VENDOR'S INFORMATION FORM

1. Legal Business Name \_\_\_\_\_
2. Street Address \_\_\_\_\_
3. City, State & Zip \_\_\_\_\_
4. Type of Business: \_\_\_\_\_ State of Registration: \_\_\_\_\_  
(Association, Corporation, Partnership, Limited Liability Company, etc.)
5. Name & Title of Authorized Signer: \_\_\_\_\_
6. Primary Contact \_\_\_\_\_
7. Phone \_\_\_\_\_ Fax \_\_\_\_\_
8. E-Mail \_\_\_\_\_
9. Company Website \_\_\_\_\_
10. Has your company ever been debarred from doing business with any federal, state, or local agency?  
Yes \_\_\_\_\_ No \_\_\_\_\_ If Yes, please state the agency name, dates, and reason for debarment.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**ATTACH COPY OF BUSINESS LICENSE AND A COMPLETED W-9 FORM**  
**THIS PAGE MUST BE COMPLETED AND SUBMITTED AS A PART OF YOUR PROPOSAL**

# Georgia Security & Immigration Compliance Act

As per the Georgia Senate Bill 529 and Senate Bill 447, the Georgia Department of Labor has promulgated new rules for the implementation of Section 2. O.C.G.A. §13-10-91 and Chapter 300-10-01-.02 state that no Georgia Public Employer shall enter into a contract for *the physical performance of services within the State of Georgia* unless the Contractor registers and participates in a federal work authorization program to verify that work eligibility information of its new employees.

The Employment Eligibility Verification “E-Verify” site operated by the U.S. Citizenship and Immigration Services Bureau of the U.S. Department of Homeland Security is the electronic federal work authorization program to be utilized for these purposes.

The website is <https://e-verify.uscis.gov/enroll/>

By executing the attached Contractor Affidavit, 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 Catoosa County Board of Commissioners has registered and is participating in this federal work authorization program in accordance with the applicability provisions and deadlines established in this Statute.

Contractor further agrees that should it employ or contract with any Sub-Contractor(s) for the physical performance of services pursuant to the contract with the Catoosa County Board of Commissioners, Contractor will secure from the Sub-Contractor(s) verification of compliance with O.C.G.A. §13-10-91.

**PLEASE INCLUDE THE ATTACHED AFFIDAVIT WITH YOUR PACKAGE**

# GEORGIA SECURITY AND IMMIGRATION COMPLIANCE ACT AFFIDAVIT

Contract No. and/or Name: 2026-21 Broker Services RFQ

Contractor's Name: \_\_\_\_\_

## STATE OF GEORGIA CONTRACTOR AFFIDAVIT

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 Catoosa County Government has registered with and is participating in a federal work authorization program\*, in accordance with the applicability provisions and deadlines established in O.C.G.A. § 13-10-91.

The undersigned further agrees that, should it employ or contract with any subcontractor(s) in connection with the physical performance of services pursuant to this contract with Catoosa County Government, Contractor will secure from such subcontractor(s) similar verification of compliance with O.C.G.A. § 13-10-91. Contractor further agrees to maintain records of such compliance.

\_\_\_\_\_  
EEV / E-Verify™ User Account Number

\_\_\_\_\_  
Date of Authorization

\_\_\_\_\_  
BY: Authorized Officer or Agent  
(Contractor Name)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title of Authorized Officer or Agent of Contractor

\_\_\_\_\_  
Printed Name of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME ON THIS THE

\_\_\_\_ DAY OF \_\_\_\_\_, 20\_\_\_\_

[NOTARY SEAL HERE]

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

My Commission Expires: \_\_\_\_\_

\*Any of the electronic verification of work authorization programs operated by the United States Department of Homeland Security or any equivalent federal work authorization program operated by 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



## Catoosa County Board of Commissioners

### **“VOLUNTARY”**

### **Title VI Statistical Data Form**

*Used for Government Monitoring Purposes*

Catoosa County Board of Commissioners is committed to board-based competition on all bids. We are gathering the following information for recordkeeping in compliance with federal regulations. All information will be considered strictly private and confidential and will be used for Title VI of the Civil Rights Act of 1964 purposes only. Your responses are strictly voluntary and will help in developing and monitoring nondiscrimination enforcement programs. This form is not part of the bid document and has no emphasis on decision of award, if you prefer not to reply that is acceptable. **Failure to complete this form will not affect your chances of award.** Your cooperation is appreciated.

Instruction for submission: **DO NOT INCLUDE WITH BID PROPOSAL.** Form should be submitted separately in a non-identifying envelope addressed to the Catoosa County Human Resources Department, 800 Lafayette Street, Ringgold, GA 30736. Please write in bid name and number for project tracking purposes.

### **2026-21 BROKER SERVICES RFQ**

**Please place an “X” on the lines that apply.**

Owner Gender: ☐ Male ☐ Female

Owner Race/Ethnicity: ☐ White/Caucasian ☐ Hispanic or Latino  
☐ Black or African American ☐ American Indian/Alaska Native  
☐ Native Hawaiian or ☐ Asian  
☐ Other Pacific Islander ☐ Two or More Races

Disability: Any person who 1) has a physical or mental impairment that substantially limits one or more major life activities; 2) has a record of such impairment; or 3) is regarded as having such impairment.  
☐ YES ☐ NO

Minority Owned Business: ☐ YES ☐ NO

Disadvantaged Business Enterprise (DBE) Company? ☐ YES ☐ NO

Number of Employees: \_\_\_\_\_

Staff Race/Ethnicity Make-Up: ☐ White/Caucasian ☐ Hispanic/Latino ☐ Asian

(provide % on line) ☐ Black or African American ☐ American Indian/Alaska Native  
☐ Native Hawaiian or Other Pacific Islander  
☐ Two or More Races

# VENDOR'S IDENTIFICATION

**THIS FORM SHALL BE ATTACHED TO THE SEALED ENVELOPE CONTAINING YOUR STATEMENT OF QUALIFICATION. (SOQ)**

**Failure to provide the following information on the sealed envelope could be considered a non-responsive SOQ.**

## VENDOR INFORMATION:

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

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

\_\_\_\_\_

\_\_\_\_\_

Phone No.: \_\_\_\_\_

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## SEALED SOQ FOR CATOOSA COUNTY GOVERNMENT

## PROJECT INFORMATION:

Project Name: 2026-21 BROKER SERVICES RFQ

Bid Opening Date: Thursday, October 22, 2026

Bid Opening Time: 2:00 PM EST

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