

April 10, 2023

Email: [fpicarelli@segalmarco.com](mailto:fpicarelli@segalmarco.com)

Segal Advisors, Inc. dba Segal Marco Advisors  
333 West 34<sup>th</sup> Street  
New York, NY 10001

ATTN: Frank Picarelli, Senior Vice President

**NOTICE OF AWARD**

**RFP No. 22-500621 Investment Consulting and Procurement Record Keeping Services**  
**Estimated Amount: \$354,000.00**

Dear Mr. Picarelli:

This confirms that the DeKalb County Board of Commissioners (BOC) at the *March 28, 2023* meeting acted to approve the contract award for the subject RFP No. 22-500621, Investment Consulting and Procurement Record Keeping Services in accordance with your response to the subject Request for Proposals.

A notice to proceed (NTP) meeting will be scheduled for a later date. Please work with Brenda H. Redus, Senior Procurement Agent, [bredus@dekalbcountyga.gov](mailto:bredus@dekalbcountyga.gov), in providing the necessary documents to complete this transaction and in conjunction with the NTP Meeting. Immediately proceed to acquire (1) the current certificate of insurance (COI), (2) valid county or city Business License, (3)\*Contractor's Affidavit, (4)\*LSBE Subcontractor Affidavit, (5)\*Certificate of Corporate Resolution and (6) **Sub-Agreement with each LSBE (see LSBE information below)** in accordance with the terms of the RFP and County Contract. The above listed executed contract documents must be completed and returned to Ms. Redus via email upon your receipt of this Notice of Award.

No work is to begin until you have received the Notice to Proceed from the Procurement Manager of DeKalb County. No County department has the authority to authorize you to perform any work until the Notice to Proceed has been issued.

Sincerely,



Brenda H. Redus, J.D., CPPO, CPPB  
Senior Procurement Agent  
Department of Purchasing and Contracting

**\*Blank documents attached for your use in providing the requested information**

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LSBE Information

**LSBE:** Fields Accounting Firm (LSBE-MSA) % Participation: 20

**NOTE:**

You are required to prepare a separate sub-agreement between your company and the above LSBE that you identified in your proposal for this project. The following language (terms and conditions) must be included in the LSBE sub-agreement:

- (1) The percentage (%)/and dollar amount of the agreement (this amount should be the same as documented on the Letter of Intent (LOI) included in your bid package.
- (2) The solicitation and contract number should also be incorporated into the document – i.e. “this sub agreement is in support of DeKalb County Contract #\_\_\_\_\_ (to be provided upon execution).
- (3) Prime shall pay the LSBE Sub no later than seven (7) calendar days from prime contractor’s receipt of payment from DeKalb County.
- (4) **Substitution Language in place of termination clause –**  
*All requests for changes or substitutions of the subcontractors named in the notarized schedule of LSBE Participation shall be made in writing to the LSBE Review Panel and shall clearly and fully set forth the basis for the request, including documentary proof or affidavits of individuals, where necessary. The LSBE Review Panel will review the request and make a final decision. The facts supporting the request must not have been known nor reasonably should have been known by either party prior to the submission of the notarized Schedule of LSBE Participation. Post-award LSBE shopping is prohibited and may be cause for cancellation, rejection or other punitive remedies against the prime contractor.*
- (5) The Prime/LSBE shall also incorporate a proposed “work schedule” that identifies the work to be completed by the LSBE according to the SOW (scope of work) through the term of the contract.

**The sub-contractor agreement between your company and the LSBE must be sent to [DekalbFirstLSBE@dekalbcountyga.gov](mailto:DekalbFirstLSBE@dekalbcountyga.gov) for approval prior to scheduling the Notice to Proceed Meeting. Also, copy Ms. Redus on this communication.**

cc: Delois Robinson, Procurement Manager