



Lee's Summit R-7 School District
Purchasing and Distribution Services
702 SE 291 Highway
Lee's Summit, MO 64063
816-986-2190
Email: christa.battaglia@leesummit.k12.mo.us

REQUEST FOR PROPOSAL FOR AN ACADEMIC SYSTEMS REVIEW
RFP NO. 2016-02

The Lee's Summit R-7 School District will accept separate sealed proposals from qualified persons or firms interested in providing:

AN ACADEMIC SYSTEMS REVIEW

Six (6) SIGNED PROPOSALS
Plus one (1) unbound copy for a total of seven (7) copies
MUST BE RECEIVED BY:

3:00 P.M. on Friday, February 12, 2016

PLEASE MARK YOUR SUBMITTAL "SEALED PROPOSAL, RFP NO. 2016-02, ACADEMIC SYSTEMS REVIEW" AND SEND IT TO:

Lee's Summit R-7 School District, Purchasing and Distribution Services Department
Attention: Christa Battaglia, Purchasing Supervisor
702 SE M-291 Highway
Lee's Summit, Missouri 64063
816-986-2210

_____		_____	
Company Name		Authorized Person (Print)	
_____		_____	
Address		Signature	
_____		_____	
City/State/Zip		Title	
_____		_____	
Telephone #	Fax #	Date	Tax ID #
_____		_____	
E-mail		Entity Type (Corporation, LLC, Sole Proprietor, Partnership)	

If submitting a "no proposal" please provide a brief explanation for the reason why and return this page:

Respondent's Initials _____

TABLE OF CONTENTS

Request For Proposals Cover Sheet	1
Table of Contents	2
Instructions to Respondents	3
Specific Requirements of RFP	3 - 4
Specifications	4 - 5
Schedule of RFP Process and Project Completion	5
Instructions To Respondents	6
Example Proposal Ranking Sheet	7
Proposal Page	8
Cooperative Procurement with Other Jurisdictions	9
Form 1, Consultant Profile	10
Form 2, Key Outside Consultants	11
Form 3, Experience/References	12
Form 4, Resume of Key Personnel	13
Form 5, Project Narrative	14
Form 6, Pricing	15
General Terms and Conditions	16 - 20
Exhibit A W9	21
Exhibit B E-Verification Affidavit	22

REQUEST FOR PROPOSAL RFP No. 2016-02 ACADEMIC SYSTEMS REVIEW

Legal Notice

The Lee's Summit R-7 School District is accepting RFPs for providing an Academic Systems Review. Specifications, terms, and conditions are specified in the RFP packet. The RFP and required specifications can be found on the District's website in the Purchasing & Distribution Services Department. Sealed RFP Submittals must be returned to the Purchasing Supervisor, at 702 SE 291 Highway, Lee's Summit, MO 64063. Sealed RFPs must be notated to indicate the RFP you are submitting and the name of the company submitting the proposal. Sealed RFPs must be received on or before 3:00 PM on February 12, 2016 at the Purchasing & Distribution Services Department (816-986-2210). The Lee's Summit R-7 School District reserves the right to reject any and all proposals, to waive technical defects in the proposals, and to select the proposal deemed most advantageous to the District.

Respondent's Initials _____

SCOPE: The District is soliciting proposals from qualified person(s) or firm(s) to provide a comprehensive academic systems review with an emphasis on the curriculum review of the Lee's Summit School District's educational program. The district has a long standing tradition of academic excellence and high student achievement and is seeking improvement in the areas of alignment of initiatives, improved processes and enhanced systems that can improve student performance.

BACKGROUND: The 117-square-mile Lee's Summit R-7 School District is recognized as one of the top educational systems in the state and nation. Located in the southeast portion of the Kansas City metropolitan area, the district serves the communities of Lee's Summit, Greenwood, Lake Lotawana and Lake Winnebago as well as unincorporated areas of eastern Jackson County and also includes a small portion of Blue Springs and Kansas City municipalities. The Lee's Summit R-7 School District has gained an annual average of 345 new students since 1990, with enrollment for 2015-16 at 17,739. The district currently includes 18 elementary schools, three middle schools, three high schools, an alternative secondary school, a secondary technology academy, an early education center and a special-education, day-treatment center.

OUR MISSION: We prepare each student for success in life.

OUR VISION: Lee's Summit R-7 is an exemplary school district, graduating students who are college and career ready with the competitive advantage necessary to be successful. Lee's Summit R-7 reflects a culture of respect and acceptance. Collaboration is an expectation that fosters mutual understanding and a focus on student achievement and staff development. Lee's Summit R-7 encourages innovation and creativity, recognizing student learning as our fundamental purpose.

1.0 INSTRUCTIONS TO RESPONDENTS:

- 1.1 Direct all questions regarding this proposal to the Supervisor of Purchasing Services listed on page 1. The District reserves the right to reject any and all proposals, to waive technical defects in proposal, and to select the proposal(s) deemed most advantageous to the District.
- 1.2 Proposals submitted on separate forms are NOT acceptable unless specified in the document. Failure to complete forms to the satisfaction of the District may result in the rejection of the proposal.
- 1.3 It is the responsibility of each respondent before submitting a proposal to examine the documents thoroughly and request written interpretation or clarifications soon after discovering any conflicts, ambiguities, errors, or omissions in the proposal documents. Requests for clarification must be received in writing no later than **January 21, 2016 at 12:00 PM Noon (CST)**.
- 1.4 Changes to the specifications will not be allowed except by written addendum issued by the District. Oral explanations or instructions given prior to award will not be binding.
- 1.5 There will be no public opening of this RFP. Information can be requested, but will not be given out until the District rejects all proposals submitted or until a signed contract with the successful firm has been acquired, per Missouri Sunshine Law.
- 1.6 Acceptance of this proposal or any part thereof, in writing, within ninety (90) days after the closing date, by the District shall constitute a legal and binding agreement; wherein, the vendor shall furnish the equipment, supplies and/or services in accordance with the specifications and respondent's proposal on the written order of the District.
- 1.7 Respondents shall initial all pages where the proposal document denotes "RESPONDENT'S INITIALS: _____".

2.0 SPECIFIC REQUIREMENTS OF RFP:

- 2.1 Evaluation: It is the intent of this agreement to be awarded to one respondent based on all relevant considerations including, but not necessarily limited to: longevity of the firm (in business 5 years or more), review services offered, ability to gather, process and evaluate information, proven techniques, references of other school districts similarly sized, ability to perform services in a timely manner, cost for the review, audit and report to the District, and any other evaluative aspect which may impact this agreement. The selected respondent's first and major concern shall be service. An example of the evaluation score sheet is attached to this RFP for your reference.

- 2.2 Licenses and Permits: The selected respondent shall secure licenses imposed by law and ordinance and pay all charges and fees, **which shall include a current City of Lee's Summit, MO, business license**. Before issuance of an agreement to the selected respondent, proof of the licenses (i.e. xerographic copy of the paid receipt or xerographic copy of the actual license) shall be provided to the Director of Purchasing & Distribution Services to be kept in the file as part of the permanent record. It shall be the responsibility of the selected respondent to contact the Treasury Division of the City of Lee's Summit at 816-969-1125, for information to obtain business licenses.
- 2.3 Insurance: The selected respondent must provide a Certificate of Insurance. See requirements listed in this RFP.
- 2.4 Work Authorization Affidavit: As a condition for the award of any agreement in excess of five thousand dollars (\$5,000), the selected respondent, as defined in § 285.530, RSMo, shall, by sworn affidavit affirming that it does not knowingly employ any person who is an unauthorized alien and provision of documentation, affirm its enrollment and participation in a federal work authorization program with respect to the employees working in connection with this agreement. The required documentation must be from the federal work authorization program provider.

The Department of Homeland Security, U.S. Citizenship and Immigration Services, (USCIS) in partnership with the Social Security Administration (SSA) operate an FREE internet-based program called E-Verify that allows employers to verify the employment eligibility of their employees, regardless of citizenship. Based on information provided by employees on their Form I-9, E-Verify checks the information electronically against records contained in DHS and Social Security Administration databases. There are penalties for employing an unauthorized alien, including suspension of the vendor's business license, termination of the agreement, and debarment from work for a period of three years or permanently, and withholding 25% of the total amount due the selected respondent.

3.0 SPECIFICATIONS

3.1 Scope of Work: The majority of the review process shall take place on District property. No District staff shall be expected to travel outside of the District. Members of the review team shall be highly trained, experienced and organized. No member of the review team shall have a vested interest in the Lee's Summit School District of any kind. Auditors are expected to use a variety of data sources during their review, such as collecting District documents, surveys and interviews. The review team will exercise care to ensure the confidentiality of these documents and of students and staff of the District. Auditors will review current programs and services in order to help the District improve student performance by analyzing current practices against research based practices in order to identify areas of strength and those needing improvement. These findings will be organized into a report that will provide detailed recommendations to serve as a plan that the District may use for multiple years.

3.2 Response time criteria:

3.2.1 Under this agreement, it is required that the selected respondent be available for this review beginning as early as March 2016. Specific dates and times will be mutually determined and agreed upon by the Project Manager and the selected respondent.

3.2.2 Failure to deliver services in accordance with this agreement and the agreement terms and conditions, may result in the District, after due oral or written notice, contacting another respondent and requesting the service be performed by them. In this circumstance, the selected respondent shall not be entitled to any payment or damages and shall pay the District for any additional costs incurred. Failure to respond or report to the job site within the agreed time frame, may be construed as a breach of this agreement, and at the District's discretion, this agreement may be terminated upon written notice by the District.

3.3 Post award information:

3.3.1 The selected respondent shall utilize competent employees in performing the service. At the request of the District, the selected respondent shall replace any incompetent, unfaithful, abusive or disorderly person in his or her employment. The District and the selected respondent shall each be promptly notified by the other of any complaints received.

3.3.2 The selected respondent shall be responsible for providing all necessary and customary equipment, tools and literature needed to fulfill the implementation of the review. In no event shall the District be responsible for any damages to any of the selected respondent's equipment damaged, destroyed or stolen.

- 3.4 Right of Owner to Terminate Agreement: The District, upon written notice, may terminate this agreement, or any part thereof, as a result of the selected respondent's failure to render to the satisfaction of the District, the material, work and/or services required of it, including progress of the work and such abandonment or termination shall not be deemed a breach by the District. The District shall be the sole determinant in all termination for cause issues. The selected respondent shall not be entitled, nor shall the District give any consideration to claims for this agreement, or any part hereof, by the District for cause. Such termination may come about for the sole convenience of the District. Upon receipt of written notification from the District that this agreement or any part hereof, is to be terminated, the selected respondent shall immediately cease operation of the service stipulated. The selected respondent and District's evaluation shall be entitled to just and equitable payment in accordance with this agreement for any uncompensated service satisfactorily performed prior to such notice.

- 3.6 Reports: Review findings shall be organized into a report that will provide detailed recommendations to serve as a plan that the District may use for multiple years. Auditors shall reveal all relevant information to the District, except where such disclosure may compromise identity of staff or others interviewed.

- 3.7 Review Meetings: The selected respondent shall designate an agent or representative to monitor and report on the over-all program through attendance at regularly scheduled meetings with the District as needed by the District. Said representative shall also be the party to whom all complaints, concerns, or requests shall be addressed. The selected respondent shall notify the District in writing of any change in the name, title, or contact information of the designated agent or representative.

- 3.8 District Provided Services: The District will provide access to areas needed between the hours of 8:00 A.M. through 4:30 P.M., Monday - Friday. The District will provide information to assist in coordination of the implementation of the review and for the interviews of staff. The District will provide interview and review facilities.

4.0 SCHEDULE OF RFP PROCESS AND PROJECT COMPLETION

4.1 Timeline for RFP Process:

The timeline listed below is the District's estimation of time required to complete the RFP process. All efforts shall be made to abide by this schedule; however, it is subject to change due to different circumstances.

Mail RFP Notification	January 22, 2016
Receive Proposals	February 12, 2016 @ 3:00 PM
Meet to review	Week of February 15, 2016
Interviews <i>(if applicable)</i>	Week of February 29, 2016
School Board	March 17, 2106
Notice to Proceed	March 18, 2016

4.2 Timeline of New Policies:

The District desires the review to be completed by mid-May, 2016.

INSTRUCTIONS TO RESPONDENTS

1. MINIMUM QUALIFICATIONS

To be considered, a firm must possess at least 5 years in business. Must be a full service review/auditing firm, specializing in academic and educational program reviewing.

2. SELECTION PROCESS

The proposals will be evaluated by a District Selection Committee (DSC) comprised of selected District personnel. The overall process may consist of two steps: the first being a review and evaluation of all responsive proposals and the second being the interview phase for the short list of respondents selected for interview, if applicable.

Step One: Evaluation of Proposals

Members of the DSC will review and rate each responsive proposal based on the following criteria:

- a. The firm's experience in providing similar services to school districts or governmental agencies during the past five (5) years.
- b. Key personnel that will be assigned to the District's project, and their experience with similar projects.
- c. Applicable resources offering quality assurances/quality control procedures; as well as adequacy of team/resources to complete the project within the proposed timeframe.
- d. Project approach including project schedule and detailed approach to complete this project, familiarity with this project, identification of unique issues related to project, and the process proposed for communications with District staff.
- e. Cost (up front submitted with proposal-see Form 6)

The Proposal Ranking Sheet for the evaluation of the proposals is included in this section. The DSC may request additional submittals.

PROPOSAL RANKING SHEET

SCORING RANGES

	<u>30 Point Questions</u>	<u>20 Point Questions</u>
Outstanding	25 – 30	17 – 20
Exceeds Expectations	19 – 24	13 – 16
Satisfactory	13 – 18	9 – 12
Below Satisfaction	0 – 12	0 – 8

Evaluation Criteria	Maximum Points	Score
<p>1. Evidence of Experience & References with Similar Accounts (Ref & Exp)</p> <p>Consider experience and references listed by the firm/provider. Is the firm/provider experienced in providing services similar to that requested in this RFP?</p> <ul style="list-style-type: none"> • Familiarity and experience with similar projects. • Consider the number of years of experience the contractor has. • Consider the number of years the firm has been in business. • Consider the references given by the firm/provider. 	30	_____
<p>2. Applicable Resources (Personnel Qualifications)</p> <p>Evaluate the extent of applicable resources available to the provider to execute the contract:</p> <ul style="list-style-type: none"> • Adequacy of proposed number of staff for implementation and training. • Consider experience of person(s) assigned to service the district's contract. 	20	_____
<p>3. Approach and Understanding of Scope</p> <p>Evaluate the provider's approach to and understanding of the scope of services required in the RFP as evidenced by the vendor's proposal:</p> <ul style="list-style-type: none"> • Detailed approach is reasonable /responsive to district's needs. • Familiarity with project locations as evidenced by proposal. • Identify/recognize critical or unique issues specific to the project. • Unique approaches that have been successful elsewhere. • Provide literature outlining plan for implementation and timeline. 	30	_____
<p>4. Cost</p> <p>Determination of cost and pricing data:</p> <ul style="list-style-type: none"> • Consider the amount of time estimated for implementation of project and the fees associated with it. • Consider the amount requested for travel for the auditing staff. • Consider whether all elements of pricing conform to the requirements of the RFP. 	20	_____
<p>TOTAL POINTS (100)</p>		_____
<p>Ranked By: _____</p>		

PROPOSAL PAGE

Respondent must complete the following section in its entirety and sign and date where indicated. This agreement shall take effect upon the approval of the District.

The undersigned respondent hereby proposes to furnish all transportation, equipment, supplies, materials and perform all necessary labor to complete all work stipulated in, required by, and in conformity with the proposed agreement documents and specifications attached hereto and other documents referred to therein for and in consideration of prices as follows:

- A. **Acceptance of proposal by District:** The District shall have a minimum of ninety (90) calendar days from the date of the proposal opening to accept respondent's offer.
- B. **Response time/delivery:** As specified in requirements
- C. **District standard payment terms are Net 30 after receipt of invoice. Please state any discounts offered:** _____
- D. **Submittals:** The following must be submitted with proposal
1. **Forms 1 - 6**
 2. **Scope of Work Questionnaire**
 3. **Completed W9 and E-Verification Affidavit**
 4. **Return all parts of this complete document (respondents to keep copy of proposal submitted)**
- E. Please list the name of your company and street address:

Company Name

Address

City, State, Zip Code

Respondent's Initials _____

COOPERATIVE PROCUREMENT WITH OTHER JURISDICTIONS:

- 1) This section is optional; it will not affect the agreement. If the District awarded you the proposed agreement, would you sell under the prices and terms of this agreement to any public school district or any other non-profit organization having membership in the Mid-America Council of Public Purchasing (MACPP) or Mid-America Regional Council (MARC) and located within the greater Kansas City metropolitan trade area? (All deliveries shall be F.O.B. Destination and there shall be no obligations on the part of any member of said Council to utilize this agreement).

YES_____ NO_____ SIGNATURE: _____

- 2) Sales will be made in accordance with the prices, terms, and conditions of the Request for Proposals and any subsequent term agreement.
- 3) There shall, however, be no obligation under the cooperative procurement agreement for any organization represented by MACPP or MARC to utilize the proposal or agreement unless they are specifically named in the Request or Proposals as a joint respondent.
- 4) All sales to other jurisdictions will be made on purchase orders issued by that jurisdiction. All receiving, inspection, payments and other agreement administration will be the responsibility of the ordering jurisdiction.
- 5) Each jurisdiction that is a party to the joint proposal has authority to act as Administrative Contracting Officer with responsibility to issue purchase orders, inspect and receive goods, make payments and handle disputes involving shipment to the jurisdiction.

FORM NO. 1: CONSULTANT PROFILE

1. Lead Consultant Firm(s) (or Joint Venture) Name and Address:
 - 1a. Firm / Provider is: National Regional Local
 - 1b. Year Firm / Provider Established:
Years of Experience providing Academic and Educational Program Audits? _____
 - 1c. Licensed to do business in the State of Missouri: Yes No
 - 1d. Name, title, telephone number and email address of Principal to contact:
 - 1e. Address of office to perform work, if different from Item No. 1:
2. Please list the number of persons by discipline that your Firm/Joint Venture will commit to the District's project:
3. If submittal is by Joint Venture or utilizes subcontractors, list participating firms/providers and outline specific areas of responsibility (including administrative, technical, and financial) for each firm:
 - 3a. Has this Joint Venture previously worked together? Yes No

FORM NO. 2: KEY OUTSIDE CONSULANTS

Each respondent must complete this form for all proposed sub contractors.

SUBCONTRACTOR #1

Name & Address

Specialty/Role with this Project:

Worked with Lead Firm Before: Yes or No

Year Firm Established:

Years of Experience providing Academic and Educational Program Audits? _____

- Complete Form No. 4 for all key personnel assigned to this project for this subcontractor.
-

SUBCONTRACTOR #2

Name & Address

Specialty/Role with this Project:

Worked with Lead Firm Before: Yes or No

Year Firm Established:

Years of Experience providing Academic and Educational Program Audits? _____

- Complete Form No. 4 for all key personnel assigned to this project for this subcontractor.
-

FORM NO. 3: EXPERIENCE/REFERENCES

Work by Firm/Provider (including any subcontractors or Joint-Venture companies) that best illustrate current qualifications relevant to the districts project that has been/is being accomplished by personnel during the past five (5) years that shall be assigned to the District's project. List no more than ten (10) total projects:

Client Name & Address:

Completion Date (Actual or Estimated):

Client Contact Person, Title & Telephone Number:

Estimated Cost for Entire Implementation and Training Project: \$

Scope of Entire Implementation of Project: (Please give quantitative indications wherever possible).

Nature of Firm's/Provider's responsibility in project: (Please give quantitative indications wherever possible).

Firms/Providers Personnel (Name/ Project Assignment) who worked on the stated project that shall be assigned to the District's project:

FORM NO. 4: RESUME OF KEY PERSONNEL

Brief resume of key persons, specialists, and individual consultants that shall be assigned to the District's Academic and Educational Program Review Project:

- a. Name and Title:

- b. Assignment:

- c. Name of Firm with which associated:

- d. Years Experience:
With this firm_____ other firms_____

- e. Education: Degree(s) or Certification(s)/Year/Specialization:

- f. Current Registration(s):

- g. Other Experience & Qualifications relevant to the proposed project:

FORM NO. 5: PROJECT NARRATIVE

Use this space to provide a detailed project approach including but not limited to:

- Project schedule and detailed approach is reasonable/responsive to District's needs
- Describe implementation process of review and findings
- Identify any and all proven techniques used during the review process
- Roles of all involved parties clearly identified
- Familiarity with project location as evidenced by proposal/interview (if applicable)
- Identify/recognize critical or unique issues specific to the project and unique approaches used elsewhere
- Proposed timeline for implementation of Academic Review and Presentation of Findings
- Proposed method of review used (interviews, surveys, site visits, etc.)
- Proposed communication process

The foregoing is a statement of facts.

Signature:

Typed Name and Title:

Telephone Number:

Date:

Respondent's Initials _____

FORM NO. 6: PRICING

	Total
Initial Review and Presentation of Findings	\$
Travel Expenses (Please use the rest of this page to break out expenses by line item and person)	\$
TOTAL	\$

Respondent's Initials _____

GENERAL TERMS AND CONDITIONS

GENERAL INSTRUCTIONS CONCERNING RFP/RFQ/BIDS

1. **AWARD.** The right is reserved, as the interest of the District may require rejecting any or all proposals and to waive any minor informality or irregularity in proposals received. The District may accept any item or group of items of any proposal unless qualified by specific limitation of the respondent. **UNLESS OTHERWISE PROVIDED IN THE SCHEDULE, PROPOSALS MAY BE SUBMITTED FOR ANY QUANTITIES LESS THAN THOSE SPECIFIED; AND THE DISTRICT RESERVES THE RIGHT TO MAKE AN AWARD ON ANY ITEM FOR A QUANTITY LESS THAN THE QUANTITY PROPOSAL UPON AT THE UNIT PRICE OFFERED UNLESS THE RESPONDENT SPECIFIED OTHERWISE IN HIS PROPOSAL.** The agreement shall be awarded to that responsible and responsive person(s) whose proposal, conforming to the Request for Proposals, will be most advantageous (lowest price and best value) to the District, price and other factors considered. An award mailed (or otherwise furnished) to the successful respondent within the time for acceptance specified in the proposal, results in a binding agreement without further action by either party.
2. **PREPARATION OF PROPOSALS.**
 - A Respondents are expected to examine the drawing, specifications, schedule and all instructions. Failure to do so will be at the respondent's risk.
 - B Each respondent shall furnish the information required by the Request for Proposals (RFP). The respondent shall sign the RFP and print or type his/her name on each sheet thereof on which he/she makes an entry. Erasures or other changes must be initialed by the person signing the offer. Proposals signed by an agent are to be accompanied by evidence of his/her authority unless such evidence has been previously furnished to the District.
 - C Unit price for each unit shall be shown and such price shall include packing unless otherwise specified. A total shall be entered in the total column for each item. In case of discrepancy between a unit price and extended price, the unit price will be presumed to be correct.
 - D Alternate proposals for supplies or services other than those specified will not be considered unless authorized by the RFP.
 - E Respondent must state a definite time for delivery of supplies or services unless otherwise specified in the RFP.
 - F Time, if stated as a number of days, will include Saturdays, Sundays, and holidays.
 - G If the item has a trade name, brand and/or catalog number, such must be stated in the proposal.
 - H In submitting proposals, the vendor agrees that the District shall have 90 days in which to accept or reject any of the prices submitted unless otherwise specified on the proposal page.
 - I Specification sheets **MUST** be returned with submittal.
3. **EXPLANATION TO RESPONDENTS.** Any explanation desired by a respondent regarding the meaning or interpretation of the RFP, terms or specifications, etc., must be requested in writing and with sufficient time allowed for a reply to reach respondents before the submission of their proposal. Verbal explanation or instruction given before the award of the agreement will not be binding. Any information given to a prospective respondent concerning a RFP will be furnished to all prospective respondents as an addendum to the RFP, if such information is necessary to respondents in submitting proposals on the RFP or if the lack of such information would be prejudicial to uninformed respondents.
4. **ACKNOWLEDGMENT OF ADDENDUM TO REQUEST FOR PROPOSALS.** Receipt of an addendum to a RFP by a respondent must be acknowledged (a) by signing and returning the addendum. Such acknowledgment must be received prior to the hour and date specified for receipt of proposals, or returned with the packet and received prior to closing time and date.
5. **SUBMISSION OF PROPOSALS.**
 - A Proposals and modification thereof shall be enclosed in sealed envelopes and addressed to Purchasing & Distribution Services, 702 SE 291 Highway, Lee's Summit, Missouri 64063. The respondent shall show the hour and date specified in the RFP for receipt, the RFP number, and the name and address of the respondent on the face of the envelope.
 - B Emailed or faxed proposals will not be considered.
 - C Samples of items, when required, must be submitted within the time specified and unless otherwise specified by the District, at no expense to the District. If not consumed by testing, samples will be returned at respondents request and expense, unless otherwise specified by the RFP.
 - D Proposals will be publicly opened as stipulated in the "Request for Proposals".
 - E Submission of a proposal constitutes an assignment by you of any and all anti-trust claims that you may have under the federal and/or state laws resulting from this agreement.
6. **FAILURE TO SUBMIT PROPOSAL.** If no proposal submitted, do not return the RFP unless otherwise specified. A letter or postcard should be sent to the Purchasing and Distribution Service office advising whether future invitations for the type of supplies or services covered by this RFP are desired. Failure of the recipient to propose or to notify

Respondent's Initials _____

Purchasing and Distribution office that future invitations are desired may result in removal of the name of such recipient from the mailing list for the type of supplies or services covered by the invitation.

7. **WITHDRAWAL OF PROPOSALS.** Proposals may be withdrawn, by written notice prior to the exact hour and date specified for receipt of proposals. A proposal also may be withdrawn in person by a respondent or his/her authorized representative provided his/her identity is made known and he/she signs a receipt for the submittal, but only if the withdrawal is made prior to the exact hour and date set for receipt of proposals. Telephone requests to withdraw a proposal will be considered only if confirmed by letter or faxed letter.
8. **LATE PROPOSALS.** Proposals will NOT be accepted after the date and time of closing under any circumstances.
9. **DISCOUNTS AND PROPOSAL EVALUATION.** Discounts offered for prompt payment may be considered in proposal evaluation. Example, if the District were to make a bulk purchase of items for a special event.
10. **MATERIAL AVAILABILITY.** Respondents must accept responsibility for verification of material availability, production schedules and other pertinent data prior to submission of proposal and delivery time. It is the responsibility of the respondent to notify the District immediately if materials specified are discontinued, replaced, or not available for an extended period of time.
11. **AWARD OF AGREEMENT.**
 - A. **BASIS OF AWARD.**
 - (1) Only qualified proposals will be considered.
 - (2) Respondents maybe requested to submit financial statements subsequent to the opening. Such statements shall be submitted to District within three (3) days after being so requested.
 - (3) The award of the agreement, if it is awarded, will be to the lowest responsible and responsive respondent whose qualifications indicate the award will be in the best interest of the District and whose proposal complies with all prescribed requirements.
 - (4) The District reserves the right to reject any and all proposals, and waive any and all informalities, and the right to disregard all non-conforming or conditional prices or counter-proposals.
 - B. **EVALUATION OF PROPOSALS.**
 - (1) The evaluation of proposals will include consideration of prior experience, financial statements, if requested, sub-contractors, suppliers, and manufacturers to be used in the work and manufacturers' data on the materials and equipment to be incorporated, quality of vending machines, and ability to provide a wide variety of quality products.
 - (2) Whenever the name of a manufacturer is mentioned on the face hereof and the words "or equal" do not follow, it shall be deemed that the words "or equal" shall follow such designations unless the face hereof specifies "no substitutes". The District may assume that items are equal or it may request samples and proof thereof unless approved before shipment. The District reserves the right to return at respondent's expense all items that are not acceptable as equals, said items to be replaced by respondent with satisfactory items at the original price.
 - C. **NOTICE OF AWARD.** After considering the basis of award and evaluation of proposals, the District will within ninety (90) days after the date of opening proposals, notify the successful respondent of acceptance of his/her proposal.
12. **QUALIFICATIONS OF RESPONDENTS.** The District may make such investigations as are deemed necessary to determine the ability of the respondent to perform the work and the respondent shall furnish all such information and date for this purpose as the District may request. The District reserves the right to reject any proposal if the evidence submitted by, or investigation of such respondent fails to satisfy the district that such respondent is properly qualified to carry out the obligations of the agreement and to complete the work contemplated therein.
13. **ANTI-TRUST.** Submission of a proposal constitutes an assignment by you of any and all anti-trust claims that you may have under the federal and/or state laws resulting from this agreement.
14. **GUARANTEE.** All customary guarantees for workmanship, quality and performance specific by the manufacturer for any or all items shall apply to the items offered under this proposal.
15. **EXPERIENCE STATEMENT** (if required). Only those proposals will be considered which are submitted by respondents who submit with their proposal an experience statement listing satisfactory service of existing vending agreements. A list of comparable projects, including pertinent information and identification of the districts or local governments, shall be submitted with the proposal. Similar experience statements shall be included for any subcontractors named in the proposal.

GENERAL CONTRACT REQUIREMENTS.

1. DEFINITIONS.

A "District" shall refer to:

Lee's Summit R-7 School District, 301 NE Tudor Road, Lee's Summit, MO, 64086-5702.

B "Selected respondent" shall refer to the corporation, company, partnership, firm, or individual, named and designated in the agreement and who has entered into this agreement for the performance of the work covered thereby, and its, his or their duly authorized agents or other legal representatives.

C The "specifications" includes Instruction to Respondents, the Terms and Conditions of Purchase, the Definitions and the technical specifications of the work.

D A "sub-contractor" is a person, firm or corporation supplying labor or materials, or only labor for work at the site of the project for, and under separate agreement or agreement with the contractor.

E The term "sample" as used herein includes natural materials, fabricated items, equipment, devices, appliances or parts thereof as called for in the specifications and any other samples as may be required by the district to determine whether the kind, quality, construction, workmanship, finish, color and other characteristics of the materials, etc., proposed by the vendor conform to the requirements of the agreement documents.

Samples approved by the District shall establish the kind, quality, and other required characteristics, and all work shall be in accordance with the approved samples. Samples, when requested, shall be supplied at no cost to the District.

F The term "estimated" represents quantities estimated for the period of time stated.

G The term "minimum" means the District will order this quantity of supplies during the period of this agreement at the price bid.

3. AGREEMENT TERMS. The performance of this agreement shall be governed solely by the terms and conditions as set forth in this agreement and any specifications or documents notwithstanding any language contained on any invoice, shipping order, bill of lading or other document furnished the Seller at any time and the acceptance by the District of any terms or conditions contained in such document which is inconsistent with the terms and conditions set forth in the agreement.

4. TRANSPORTATION CHARGES. When terms of delivery or conditions of this order are F.O.B. destination, all transportation charges shall be paid by the selected respondent.

5. PACKAGING. The District will not be liable for any charges for delivery, packing, cartage, boxing, crating or storage in excess of the purchase price of this order unless stated otherwise herein.

6. INSPECTION AND ACCEPTANCE. No material received by the District under the terms and conditions of this document shall be deemed accepted until the District has had reasonable opportunity to inspect said material. All material which is discovered to be defective or which does not conform to any warranty of the selected respondent or herein, upon initial inspection, or at any later time if the defects contained in the material were not reasonably ascertainable upon the initial inspection, may be returned at the selected respondent's expense for full credit or replacement.

7. GENERAL GUARANTY AND WARRANTY. The selected respondent warrants that all materials, fixtures, and equipment furnished by the selected respondent's and his/her sub-contractors shall be new, of good quality, and of good title, and that the work will be done in a neat and workmanlike manner. The selected respondent also guarantees the workmanship and materials for a period of one year from the date of final acceptance of all the work required by the agreement. Furthermore, he/her shall furnish the District with all manufacturers' and suppliers' written guarantees and warranties covering materials and equipment furnished under the agreement.

8. PATENTS. The selected respondent warrants that the articles described herein and the sale or use of them will not infringe upon any U.S. or foreign patent and selected respondent covenants that he will at his own expense, defend every suit which may be brought against the District, or those selling or using district's product (provided selected respondent is promptly notified of such suit and all papers therein are delivered to selected respondent) for any alleged infringement of any patent by reason of the sale or use of such articles and selected respondent agrees that he will pay all cost, damages and profits recoverable in any such suit.

9. QUANTITIES. The District assumes no obligation for products or materials shipped in excess of the quantity ordered hereunder. Any unauthorized quantity is subject to District's rejection and return at selected respondent's expense.

10. ACTS OF GOD. Neither party shall be liable for delays, or defaults in the performance of this agreement due to acts of God or the public enemy, riots, strikes, fires, explosions, accidents, governmental action of any kind or any other causes

Respondent's Initials _____

of a similar character beyond its control and without its fault or negligence.

11. **BANKRUPTCY OR INSOLVENCY.** In the event of any proceedings by or against either party, voluntary or involuntary, in bankruptcy or insolvency, or for the appointment of a receiver or trustee or an assignee for the benefit of creditors, of the property of selected respondent, or in the event of breach of any of the terms hereof including the warranties of the selected respondent, the District may cancel this agreement or affirm the agreement and hold selected respondent responsible in damages.
12. **COMPLIANCE WITH APPLICABLE LAWS.** The vendor shall comply with all federal, state or local laws, ordinances, rules, regulations and administrative orders, including but not limited to Wage, Labor, Unauthorized Aliens, EEO and OSHA-type requirements which are applicable to the vendor's performance under this agreement. Vendor shall indemnify and hold the District harmless on account of any violations thereof relating to Vendor's performance under this agreement, including imposition of fines and penalties which result from the violation of such laws.
13. **LAW GOVERNING.** All agreements shall be subject to, governed by, and construed according to the laws of the State of Missouri. Any dispute regarding this agreement will be decided by a Missouri Court.
14. **TIME OF DELIVERY.** The District requires that all materials ordered will be delivered when specified. Time is therefore of the essence of this purchase order. If deliveries are not made at the time agreed upon, the District reserves the right to cancel or to purchase elsewhere and hold vendor accountable for any damages sustained as a result thereof.
15. **INTERPRETATION OF AGREEMENT AND ASSIGNMENTS.** This agreement shall be construed according to the laws of the State of Missouri. This agreement, or any rights, obligations, or duties hereunder may not be assigned by the selected respondent without the District's written consent and any attempted assignment without such consent shall be void.
16. **SELECTED RESPONDENT'S INVOICES.** Invoices shall be prepared and submitted in duplicate unless otherwise specified. Invoices shall contain the following information: agreement number (if any), purchase order number, item number; agreement description of supplies or services, sizes, quantities, unit prices and extended totals. Invoices for and inquiries regarding payment should be addressed to the Lee's Summit R-7 School District's Business Services Department. Any delay in receiving invoices, or errors and omissions, on statement or invoices will be considered just cause for withholding settlement without losing discount privileges.
17. **NOTICE AND SERVICE THEREOF.** Any notice to any vendor from the District relative to any part of this agreement will be in writing and considered delivered and the service thereof completed when said notice is posted, by certified or regular mail, to the said selected respondent at his/her last given address or delivered in person to said selected respondent or his/her authorized representative on the work or service.
18. **PROVISIONS REQUIRED BY LAW DEEMED INSERTED.** Each and every provision of law and clause required by law to be inserted in this agreement will be deemed to be inserted herein and the agreement will be read and enforced as though it were included herein, and if through mistake or otherwise any such provision is not inserted, or is not correctly inserted, then upon the application of either party the agreement will forthwith be physically amended to make such insertion or correction.
19. **TERMINATION OF AGREEMENT.** This agreement may be terminated by either party upon thirty (30) days prior notice in writing to the other party. The District may terminate this agreement immediately, under breach of agreement, if the selected respondent fails to perform in accordance with the terms and conditions. In the event of any termination of agreement by the selected respondent, the District may purchase such supplies and/or services similar to those so terminated, and for the duration of the agreement period the selected respondent will be liable for all costs in excess of the established agreement pricing.
20. **INDEMNITY AND HOLD HARMLESS.** The selected respondent agrees to indemnify, release, defend, and forever hold harmless the District, its officers, agents, employees, and elected officials, each in their official and individual capacities, from and against all claims, demands, damages, loss or liabilities, including costs, expenses, and attorneys fees incurred in the defense of such claims, demands, damages, losses or liabilities, or incurred in the establishment of the right to indemnity hereunder, caused in whole or in part by the selected respondent, his/her sub-contractors, employees or agents, and arising out of services performed by the selected respondent, his/her subcontractors, employees or agents under this agreement to the extent permitted by the Constitution and the Laws of the State of Missouri.
21. **SUB-AGREEMENTS.**

- A. The selected respondent shall not execute an agreement with any sub-contractor to perform any work until he/she has written the District to determine any disapproval of the use of such sub-contractor.
 - B. The selected respondent shall be fully responsible to the District for the acts and omissions of his/her sub-contractors, and of persons either directly or indirectly employed by them, as he/she is for the acts and omissions of persons directly employed by him/her.
 - C. The selected respondent shall cause appropriate provisions to be inserted in all sub-contracts relative to the work to require compliance by each sub-contractor with the applicable provisions of the agreement.
 - D. Nothing contained in the conditions shall create any contractual relationship between any sub-contractor and the District.
22. **UNIFORM COMMERCIAL CODE.** This agreement is subject to the Uniform Commercial Code and shall be deemed to contain all the provisions required by said Code that apply to said agreement.
23. **CHANGES.** The District may at any time, by written order, without notice to any surety, make changes or additions, within the general scope of this agreement in specifications, instructions for work, methods of shipment or packing or place of delivery. If any such change causes an increase or decrease in the cost of or in the time required for performance of this agreement, the selected respondent shall notify the District in writing immediately and an appropriate equitable adjustment will be made in the price or time of performance, or both, by written modification of the agreement. Any claim by the selected respondent for such adjustment must be asserted within thirty (30) days or such other period as may be agreed upon in writing by the parties after the selected respondent's receipt of notice of the change. Nothing herein contained shall excuse the vendor from proceeding with the agreement as changed.
24. **RESPONSIBILITY FOR SUPPLIES.** The selected respondent shall be responsible for supplies until they are delivered and accepted at the designated delivery point; and the selected respondent shall bear all risks for rejected supplies after notice of rejection.
25. **EXECUTION OF AGREEMENT.** The agreement shall consist of a **YEARLY AGREEMENT** and a copy of the selected respondent's signed proposal attached and that the same, in all particulars, becomes the agreement and agreement between the parties hereto. That both parties thereby accept and agree to the terms and conditions of said proposal documents, and that the parties are bound thereby and the compensation to be paid the selected respondent is as set forth in the selected respondent's RFP. Items not awarded, if any, have been deleted.
26. **NON-DISCRIMINATION IN EMPLOYMENT.** In connection with the furnishing of supplies or performance of work under this agreement, the selected respondent agrees to comply with the Fair Labor Standard Act, Fair Employment Practices, Equal Opportunity Employment Act, and all other applicable federal and state laws, and further agrees to insert the foregoing provision in all subcontracts awarded hereunder.
27. **TAX EXEMPT.** Do not bill tax on bulk purchases for special events. The District is exempt from payment of the Missouri Sales Tax in accordance with Section 39 (10), Article 3, of the Missouri Constitution and is exempt from payment of Federal Excise Taxes in accordance with Title 26, United States Code annotated.
28. **ASSIGNMENTS.** Neither the District nor the selected respondent shall, without the prior written consent of the other, assign in whole or in part his interest under any of the agreement documents and, specifically the contractor shall not assign any moneys due or to become due without the prior written consent of the District.

Exhibit A

W9 for Selected Respondent to Complete:

<p>Form W-9 (Rev. October 2007) Department of the Treasury Internal Revenue Service</p>	<p>Request for Taxpayer Identification Number and Certification</p>	<p>Give form to the requester. Do not send to the IRS.</p>
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Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name, if different from above	
	Check appropriate box: <input type="checkbox"/> Individual/Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ <input type="checkbox"/> Exempt payee <input type="checkbox"/> Other (see instructions) ▶	
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	City, state, and ZIP code	
List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number
or
Employer identification number

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,

Exhibit B

E-Verification Affidavit for Selected Respondent to Complete:



Lee's Summit R-VII School District

301 NE Tudor Road
Lee's Summit, Missouri 64086
(816) 986-1000 • FAX (816) 986-1168

Business Services

As a condition for any service provided to the Lee's Summit R-VII School District, a business entity shall, by sworn affidavit and provision of documentation, affirm its enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services.

Every such business entity shall complete the following affidavit affirming that it does not knowingly employ any person who is an unauthorized alien in connection with the contract services. [RSMO 285.530 (2)]. The completed affidavit must be returned as part of the contract documentation or mailed to Lee's Summit R-VII School District, Attn: Accounts Payable, 301 NE Tudor Road, Lee's Summit, Missouri 64086.

This affidavit affirms that _____ (Company Name) is enrolled in, and is currently participating in, E-verify or any other equivalent electronic verification of work authorization operated by the United States Department of Homeland Security under the Immigration Reform and Control Act of 1986 (IRCA); and _____ (Company Name) does not knowingly employ any person who is unauthorized alien in conjunction with the contracted services.

Name (Please Print) of registered agent, legal representative or corporate officer

Title

Signature of registered agent, legal representative or corporate officer

Subscribed and sworn to before me this _____ of _____. I am commissioned as
(DAY) (MONTH, YEAR)

a notary public within the County of _____, State of _____, and my commission
(NAME OF COUNTY) (NAME OF STATE)

expires on _____
(DATE)

Signature of Notary

Date

Failure to respond will cause payments due to you to be held until affidavit is received. Once the affidavit is received, payments will be released.

Respondent's Initials _____