



R-20/21-15

Annual Audit Services

Issue Date: 2/11/2021

Questions Deadline: 2/26/2021 12:00 PM (CT)

Response Deadline: 3/8/2021 02:00 PM (CT)

Contact Information

Contact: Christa Battaglia

Address: Purchasing

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Lee's Summit, MO 64063

Phone: (816) 986 x2196

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Event Information

Number: R-20/21-15
Title: Annual Audit Services
Type: Request for Proposal
Issue Date: 2/11/2021
Question Deadline: 2/26/2021 12:00 PM (CT)
Response Deadline: 3/8/2021 02:00 PM (CT)
Notes: Enclosed is a Request for Proposal (RFP) for **Annual Audit Services**. The proposed period of the awarded Agreement will be for a one-year period, with two one-year renewal options. The responsive Proposal will comply with all federal, state, and local regulations. Information regarding the services to be provided, information which must be submitted as part of the Proposal, and related details are included in this RFP.

All interested parties must submit Proposals by March 8, 2021, before 2:00 p.m., CST. No late submittals will be accepted. The Board of Education reserves the right to accept or reject any or all Proposals, to waive any irregularities, and to accept the Proposal that is in the best interest of the District. The award for Annual Audit Services will be considered by the Board at its regular meeting in April 2021.

All proposals that are received become a part of the District's file, and there is no obligation by the District to accept any proposal. Following the review of the proposals, we may request that certain proposers be present for interviews, which will be scheduled at a mutually agreeable time during the week of March 22, 2021.

If you are having difficulty submitting electronically, please contact Christa Battaglia at 816-986-2196 or email christa.battaglia@lsr7.net for instructions. It is the responsibility of interested firms to check <https://lsr7ebid.ionwave.net> for any addendums or notices of information prior to the opening date and time of this RFP.

Ship To Information

Contact: Steve Williams
Address: Business Services
301 NE Tudor Rd
Lee's Summit, MO 64086-5702
Phone: (816) 986 x1000

Billing Information

Address: Business Services
301 NE Tudor Rd
Lee's Summit, MO 64086-5702
Phone: (816) 986 x1000

Bid Attachments

4_-MO_Tax_Exemption_Certificate.pdf

Missouri Tax Exemption Certificate

[View Online](#)

3_-E-Verify-LSR7_(1) (1).pdf

E-Verify

[View Online](#)

1_-Sample_Insurance_Certificate.pdf

Certificate of Insurance

[View Online](#)

General Terms & Conditions for RFPs, RFQs and Bids.pdf

General Terms and Conditions

[Download](#)

Attachment No.1 Firm Identification Form.pdf

Form No 1 Firm Identification Form

[View Online](#)

Attachment No. 2 Ref and Exp.pdf

Form No 2 References and Experience

[View Online](#)

Attachment No. 3 Firm Resume & Personnel Commitment.pdf

Form No 3 Firm Resume and Personnel Commitment

[View Online](#)

Attachment No.. 4 Proposed Time & Price.pdf

Form No 4 Proposed Timeline & Pricing

[View Online](#)

Attachment No. 5 Proposed Dates of Engagement.pdf

Form No 5 Proposed Dates of Engagement

[View Online](#)

Bid Attributes

1 Introduction

The Lee's Summit R-7 School District is soliciting proposals for Annual Auditing Services. The District is requiring proposers to submit their proposals electronically. Electronic submissions help eliminate errors, eliminate unnecessary work, and is more friendly to the environment. Lee's Summit R-7 School District will not accept proposals that are submitted via postal mail, in person delivery, email or fax machine. The District reserves the right to accept or reject any and all proposals and to waive any formalities or technicalities if deemed in the best interest of the District. It is the responsibility of all respondents to review the entire proposal, seek clarification of any item or requirement that may not be clear, and check all responses for accuracy before submitting a response.

District Information

1. The District has the following funds: General (Incidental) which includes Nutrition Services, Student Activities, Before and After School Services, and an Insurance Reserve, Special Revenue (Teachers), Debt Service, and Capital Projects.
2. The District originally budgeted expenditures for FY21 of \$316,077,411, including \$80,116,572 in General Fund expenditures, \$135,196,288 in Teacher's Fund expenditures, \$17,317,292 in Capital Project Fund expenditures, \$50,000,000 in the Bond Fund, \$8,065,073 in the Nutrition Services Fund, \$3,158,310 in the Before and After School Fund, \$4,500,000 in the Student Activity Fund, and \$17,723,876 in Debt Service expenditures.
3. The District originally budgeted revenues for FY21 of \$454,567,627, including \$114,784,637 in General Fund revenue, \$7,883,394 in the Nutrition Services Fund, \$3,176,810 in the Before and After School Fund, \$4,700,000 in the Student Activity Fund, \$91,586,064 in Teacher's Fund revenue, \$6,938,276 in Capital Projects revenue, \$200,000,000 in the Bond Fund, \$25,498,446 in Debt Service revenue.
4. The District's fund balance at June 30, 2020 were:
 - General (Incidental) Fund \$64,155,799
 - Special Revenue (Teachers) Fund \$0.00
 - Debt Service Fund \$37,785,431
 - Capital Projects Fund \$14,045,745
 - Total All Funds \$115,986,975
5. The District's Assessed Valuation as reported September 29, 2020 was \$2,319,728,063.
6. The District's current tax rate is \$5.4705 including \$4.3505 for the General Fund, \$0.0500 for the Capital Projects fund and \$1.0700 for the Debt Service Fund.
7. The District's enrollment in September 2020 was 17,805.
8. The District's Free and Reduced Lunch count from December 2020 was: 14,214 (79.62%) unreduced, 2,972 free (16.65%) and 665 reduced (3.73%).
9. The District employs over 2,650 teachers, support personnel and administrators. The district contracts with Kelly Services for substitutes.
10. The District uses PowerSchool - Business Plus software for its financial accounting and payroll system and uses PowerSchool for its student/attendance data. The District uses Workforce for its time clock system.
11. The modified cash basis of accounting has been used and will be used for all funds and accounts.
12. Budgeted revenues and expenditures are incorporated into the general ledger systems and encumbrances are recorded in the accounting records as funds are committed.
13. 2019-20 audited financial statements and the budget for fiscal 2020 are available on the district website at www.lsr7.org.

2 Instructions to Respondents

1. All questions regarding this RFP shall be submitted online via the "Questions" tab of this bid opportunity. The District reserves the right to reject any and all proposals, to waive technical defects in proposals, and to select the proposal(s) deemed most advantageous to the District.
2. 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 submitted online via the "Questions" tab.
3. Any information given to a Firm concerning the RFP will be furnished to all Firms as an addendum to the RFP if, in the District's sole discretion, such information is deemed necessary to all Firms submitting Proposals on the RFP, or if the lack of such information would be prejudicial to uniformed Firms. The Firms should rely only on written statements issued by the District in the form of an addendum to the RFP.
4. No oral interpretation will be made to any Firm as to the meaning of the RFP. Any oral communication will be considered unofficial and non-binding on the District. Unauthorized contact by the Firm with other District employees or Board members regarding the RFP may result in disqualification.
5. Changes to the specifications will not be allowed except by written addendum issued by the District through this online procurement system. Oral explanations or instructions given prior to award will not be binding.
6. There will be no public opening of the proposals.
7. The information presented in the RFP is not to be construed as a commitment of any kind on the part of the District. There is no expressed or implied obligation for the District to reimburse responding firms for any expense incurred in the preparing of Proposals in response to this request.
8. Proposals submitted in response to this RFP should include a "not-to-exceed" fee of what the firm would charge to perform the District's audit.
9. Although the District cannot bind future governing bodies, it is anticipated that the Firm selected to serve as the District's auditor will be retained for a 3-year period with annual evaluations made of its services.
10. All proposals must be submitted on the District forms as attached. Proposals submitted on forms other than the enclosed may be rejected. No alternate Proposals that significantly deviate or modify the concept and ultimate objectives of this RFP will be considered. Non-compliance with RFP specifications will disqualify Proposals from further consideration.
11. Any explanation or statement that the Firm wishes to make must be contained with the Proposal but shall be written separately and independently of the Proposal proper and attached thereto. Unless the Firm so indicates, it is understood that the Firm's proposal is in strict accordance with the RFP requirements.
12. The District reserves the right to reject any or all Proposals and to waive informalities and minor irregularities in Proposals received. The District, in its sole discretion, will determine whether an irregularity is minor.
13. All Proposals shall be deemed final, conclusive, and irrevocable; and no Proposal shall be subject to correction or amendment for any error or miscalculation. No Proposal shall be withdrawn without the consent of the District after the scheduled closing time for the receipt of Proposals.
14. The Firm is responsible for its own verification of all information provided to it. The Firm must satisfy itself, upon examination of this RFP, as to the intent of the specifications. After the submission of the Proposal, no complaint or claim that there was any misunderstanding will be entertained.
15. Proposals may contain data that the Firm does not want used or disclosed for any purpose other than evaluation of the Proposal. The use and disclosure of such data may be so restricted, provided the Firm marks the cover sheet of the Proposal with the following legend: "Technical data contained on pages _____ and _____ in this Proposal furnished in the connection with the Request for Proposal of the Lee's Summit School District shall not be used nor disclosed except for evaluation purposes, provided that, if a Contract is awarded to this Firm as a result of or in connection with the submission of this Proposal, the Lee's Summit School District shall have the right to use or disclose technical data to substantiate the award of the Contract."
16. The above restriction does not limit the District's right to use or disclose without the Firm's permission any technical data obtained independently from another source. Proposals shall not contain any restrictive language different from the above legend. Proposals submitted with restrictive legends or statements which differ from the above will be treated under the terms of the above legend. The District assumes no liability for disclosure or use of unmarked technical data and may use or disclose the data for any purpose.
17. The District may accept one part, aspect, or phase, or any combination thereof, of any Proposal unless the Firm specifically qualifies its offer by stating that the Proposal must be taken as a whole.
18. The District may award a contract based upon the initial Proposals received without discussion of such Proposals. Accordingly, each initial Proposal should be submitted with the most favorable price and service.
19. The District reserves the right to hold negotiations in an attempt to clarify and qualify terms of any Proposal.
20. The District reserves the right to negotiate final contract terms with any Firm, regardless of whether such Firm was interviewed or submitted a best and final Proposal.
21. The District may accept any Proposal as submitted whether or not negotiations have been conducted between the parties.

22. Neither the commencement nor cessation of negotiations shall constitute rejection of the Proposal or a counteroffer on the part of the District.
23. The Firm shall not, under penalty of law and immediate disqualification of the Proposal, offer or give any gratuities, favors, or anything of monetary value to an officer, employee, agent, or Board of Education member of the District for the purpose of influencing favorable disposition toward a submitted Proposal or for any reason while a Proposal is pending or during the evaluation process.
24. No Firm shall engage in any activity or practice, by itself or with other Firms, the result of which may be to restrict or eliminate competition or otherwise restrain trade. Violation of this instruction will result in immediate rejection of the Firm's Proposal.
25. In the event of a conflict between the Proposal and the RFP, the District shall resolve any inconsistency in favor of the RFP. Additionally, the District shall in good faith decide all inconsistencies and/or disputes pertaining to the RFP and the Proposal. The Firm agrees to abide by the decision of the District.
26. Initial Proposals may not be withdrawn for 90 calendar days from the due date for Proposals except with the express written consent of the District. If a Proposal is accepted as submitted, the negotiated final Agreement shall consist of the Agreement, this RFP, plus any addenda thereto, and the Firm's Proposal.
27. In the event the Agreement initially awarded by the District is terminated for any reason within 120 days of the due date for Proposals, the District reserves the right to negotiate and accept any other submitted Proposal.
28. The District shall not be responsible for any pre-Agreement expenses of any Firm, including the successful Firm, incurred prior to the commencement of the Agreement.

I have read and understand.

(Required: Check if applicable)

3 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:

1. Each Proposal will be reviewed and rated by District staff members. The areas assessed will include, but not be limited to:
 - a. Prior auditing experience:
 - i. Auditing Missouri public school districts
 - ii. Auditing local governments
 - iii. Auditing entities of similar size and nature
 - b. Organization, size, and structure of the firm
 - c. Realistic time estimates
 - i. Audit Plan
 - ii. Estimated number of hours for each staff member
 - d. Qualifications of staff to be assigned to audit
 - i. Qualifications and make-up of team
 - ii. Overall supervision to be exercised over audit team by the Firm's management
 - e. The Firm's understanding of the work to be performed
 - f. Cost of the audit
2. The contract will be awarded to the Firm whose offer conforming to the RFP is determined to be most advantageous to the District, price and other factors considered. The District reserves the right to act as sole and undisputed judge of what is most advantageous to the District.

Step Two: Interviews (If needed)

The District may conduct interviews with selected firms in connection with its evaluation of the Proposals.

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

4 Responding to Attributes

There are attributes, including this one, associated with this proposal. Some are notes and require no response, but most have a required response. ****Please select each page from the bottom right-hand side of this list of attributes in order to view the next page of Bid Attributes.****

5 Attachments Required

Be sure to upload all required documents and forms to the "Response Attachments" Tab.

6 Purchase Agreements

Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee's Summit R7 Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, lead time, and determined to be in the best interest of the District. The bid award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the bid that is in the best interest of the District.

I have read and understand.

(Required: Check if applicable)

7 Terms of This Bid

The terms of this bid shall remain in effect for at least one year from date of award. All prices MUST remain firm during that time period. The District may make additional purchases at the itemized price listed in the bid packet for a period of one (1) year. The District may, at its option, renew the Contract for up to two (2) additional one-year contract periods by giving written notice to the supplier.

I have read and understand.

(Required: Check if applicable)

8 Bid Pricing

After the first year, the vendor may submit a price adjustments to the District based on a Manufacturer's Revised Published Price List. The request MUST contain a written notification from the manufacturer to the supplier or vendor of price increases. The Revised Published Price List or manufacturer's notification shall be submitted to the District at least thirty (30) calendar days prior to the effective date of the new price to be charged to the District. It shall be understood that such price adjustments shall not exceed the amount passed onto the supplier or vendor by the manufacturer. It shall be further understood that the District reserves the right to reject any price adjustments submitted by the bidder and/or to terminate the contract with the bidder based on such price adjustments.

The successful bidder(s) must agree to accept the District's Purchase Order or the District's Mastercard P-card for the work order. These purchases are tax exempt.

The Lee's Summit R7 School District will review all bid submissions with regards to pricing, product performance, equipment features, references and experience. The District plans to award the bid within 60 days after the bid opening.

I have read and understand.

(Required: Check if applicable)

9 Communications Statement

Communications: Contact between vendors and Lee's Summit R7 personnel during the proposal process or evaluation process is prohibited. Any attempt by vendors during the proposal process to contact Lee's Summit R7 personnel may result in disqualification. All communication shall go through the Purchasing and Contracts Department during this competitive process. All questions received and the corresponding answers will be distributed to all bidders. No verbal responses will be provided. The deadline for questions about this proposal is stated in the Bid Activities and the district will not respond to questions after this time and date. Response to questions will be posted in the form of an addendum to this proposal. The vendors will be responsible for checking the website for any posted addenda.

I have read and understand.

(Required: Check if applicable)

10 General Terms and Conditions

I have downloaded and read the General Terms and Conditions from the ATTACHMENTS tab. By selecting this box, I agree to to the terms and conditions.

I have read and agreed to the T&C

(Required: Check if applicable)

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1 **Proposal Requirement**

Proposal Format, Contents, and Submittal Schedule

It is the purpose of this RFP to obtain as complete a set of data as possible from each Firm. This will enable the District to determine which Firm is best able to meet all of the criteria that are to be considered in the award of Annual Audit Services.

Proposal Format and Contents

The Firm's proposal package shall contain the following items in the order listed below and utilize the forms proved in the Attachment Section of the RFP. The Firm is urged to be concise yet thorough in its presentations. Pertinent supplemental information should be referenced and included as attachments. All Proposals must contain the following:

1. Letter of Transmittal

The Letter of Transmittal should include an introduction of the Firm; an expression on the Firm's understanding of the work to be done, and its ability and desire to meet the requirements of the RFP; a commitment to perform the work within the specified time period; and any other information not identified in the Proposal itself should also be included. The Letter of Transmittal must be signed by an officer of the Firm with authority to bind the Firm to an Agreement.

2. Executive Summary

The Proposal shall include an Executive Summary that briefly describes the Firm's approach to meeting the District's requirements as outlined in the RFP, any major requirements cannot be met and highlights of the major features of the Proposal. The reader should be able to determine how well the Proposal meets the District's requirements by reading the Executive summary.

3. Firm Identification (Attachment 1)

The cover sheet identifies the Firm's name, mailing address, telephone, e-mail address, fax, and contact persons. An officer of the Firm must sign the Firm Identification Form.

4. References and Experience (Attachment 2)

Each Firm must submit a minimum of five (5) references. Each reference must be presently using services similar to those requested in this RFP; at least three (3) of the references should be public school districts. No reference may be an affiliate of the Firm or the Firm's officers, directors, shareholders, or partners.

5. Firm Resume and Personnel Commitment (Attachment 3)

The Firm shall complete the Firm Resume and Personnel Commitment Form, indicating the personnel it anticipates will work on the audit for the District.

6. Proposed Time and Price (Attachment 4)

The Firm shall indicate the cost for providing annual audit services (including the completion of the financial statements and not disclosures as indication in the Scope of Services section) by completing the Proposed Time and Price Form. A separate form shall be completed for each of the years proposed.

7. Proposed Dates for Engagement (Attachment 5)

The Firm shall complete the Proposed Dates for Engagement Form.

1
2 **Scope**

This contract will include but is not limited to:

1. The auditor will express opinions on the fair presentation of the District's basic financial statements in accordance with the basis of accounting used by the District.

2. The annual audit will entail an audit of the District's financial records including the General, Special Revenue, Debt Service and Capital Projects funds. Fiduciary funds, proprietary funds, component units that do not issue their own financial statements, transportation, attendance, food service, and federal and state program records should also be included. Other programs, funds or processes as specified by the Board or required by law should also be included.

3. The annual audit will review and test the system of administrative control over compliance with federal laws and regulation to the extent considered necessary by the audit of and as required by the U.S. General Accounting Office's Government Auditing Standards.

4. The annual audit shall conform to all Missouri State Statutes, all requirements of the Department of Elementary and Secondary Education (DESE), the Single Audit Act of 1996, and the provisions of OMB Circular A-133, GASB 34, and District Board policy "DIE" (see attachment #6).

5. The annual audit will be conducted in conformance with financial reporting requirements in accordance with generally accepted auditing standards and Government Auditing Standards.

6. The District uses the modified cash basis of accounting for all funds and accounts. The District follows the procedures outlined in the Missouri Financial Accounting Manual.

7. Assistance is available from the Accounting Office staff in the following areas:

District staff can prepare confirmations and schedules/work papers, if the Firm provides a list of its needs and desired format.

District staff is also available to pull documents from the list provided by the Firm and to reproduce documents.

8. The Firm must provide a "To Be Prepared by Client" listing three weeks prior to the arrival of the audit team for both the Interim and Final field work.

9. The District will issue representation letters for asset, liability, and contingent liabilities after consultation with the Firm.

10. Available office space is located in the same building as the Accounting Office, and will be provided to the Firm. The Firm must supply its own equipment and supplies.

11. The District may request, from time to time, that additional services be performed in conjunction with the audit. It is understood that an agreed-upon procedure letter would be prepared outlining the work to be performed and the estimated cost.

12. The Proposal should identify and describe any anticipated potential audit problem, the Firm's approach to resolving these problems and any special assistance that will be requested from the District.

13. In addition, as a non-audit service, the Firm will prepare the applicable draft financial statements (all district-wide and government statements), footnote disclosures, required supplementary information, supplementary information, other financial information, and supplementary state information. These documents will be review by District employees who possess the appropriate knowledge, skills, and ability to appropriately evaluate the drafted documents.

14. The Firm shall conduct an entrance conference prior to the start of fieldwork and an exit conference prior to their departure from final fieldwork. These conferences shall be conducted with the District's Audit Committee and administrators.

15. The Partner or Manager of the engagement shall be integrally involved in all phases of the engagement.

16. A presentation to the Board of Education by the Firm is required prior to the December 31st deadline for filing with DESE.

17. The Firm will supply ten (10) bound copies of the audit and management letter each year.

18. The Firm must provide an electronic pdf version of the completed audit report pursuant to the DESE requirements for submission to that office.

19. The Firm shall prepare a condense Statement of Revenues, Expenditures, and Changes in Fund Balances – Governmental Funds, with a summary statement of the scope of the audit examination and the auditor's opinion of the financial statements including in the audit report. This must be available in time to be published in the newspaper within thirty days of the receipt of the audit report by the Board of Education.

20. If requested, provide an internal control site review at school site locations. These reviews will serve to provide a site review for all schools on a rotating basis every 3 years as mutually agreeable between the Firm and the District. This review will include all areas within a given school site that have cash-handling responsibilities, including but not limited to the site's main office, library and nutrition services. Following the review, a report is generated outlining the processes reviewed, a listing of strengths and weaknesses, and recommendations for improvement. A separate hourly fee should be included for these services provided for in Attachment 4, Section C.

I have read and understand.
(Required: Check if applicable)

**1
3** **SPECIFIC REQUIREMENTS OF RFP:**

1. Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee's Summit R7 Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, and service, and determined to be in the best interest of the District. The RFP award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the proposal that is in the best interest of the District.
2. The terms of this RFP shall remain in effect for at least one year from date of award. All prices MUST remain firm during that time period.
3. The successful respondent(s) must agree to accept the District's Purchase Order or the District's Mastercard P-card for the order. These purchases are tax exempt.
4. The District, in its discretion, may terminate the Agreement in whole or in part at any time, whenever it is determined that the successful Firm has failed to comply with or breached one or more of the terms and conditions of the Agreement or specifications incorporated therein and the successful Firm as failed to correct such failure or breach to the District's satisfaction with a period of 15 days after receiving written notice thereof from the District. In the event of the partial or total termination of the Agreement, it is hereby agreed that the District shall only be obligated to pay in accordance with the terms of the Agreement for material and services, which have been accepted by the District.
5. The District may terminate the Agreement without cause by notifying the successful Firm in writing 30 days prior to the effective date of termination. The successful Firm shall not incur new obligations after the effective date of termination and shall cancel as many outstanding obligations as possible.
6. In the event the Board of Education of the District fails to approve the appropriation of funds sufficient to provide for the District's obligations under the Agreement, or if the funds are not appropriated due to federal, state, or local action, the District shall have the right to terminate the Agreement by providing written notice to the successful Firm and the District will thereby be relieved from all further obligations under the Agreement.
7. The District may terminate the Agreement immediately without further cost or liability in the event of the occurrence of any of the following: insolvency of successful Firm; liquidation or dissolution of successful Firm; the institution of any voluntary or involuntary bankruptcy proceeding by or against the successful Firm; assignment by successful Firm for the benefit of creditors; or the appointment of a receiver or trustee to manage the property of the successful Firm.

**1
4** **Schedule of RFP Process**

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.

RFP Notification 2.12.21
Receive Proposals 3.8.21
Meet to review week of 3.15.21
School Board 4.15.21
Notice to Proceed 4.16.21

Auditing Services need to begin for the June 30, 2021 fiscal year end.

1
5

No Deviations or Exceptions

Bidders are expected to bid on the items as listed in the Scope of Work. If there are any deviations from the specifications or scope of work listed, the bidder is expected to make note, along with a brief description in the next below. The District reserves the right to determine the successful bidder and will make that decision based on the best interest of the District.

I have read and agree.

(Required: Check if applicable)

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6

Deviations and Exceptions

If your company intends to deviate from the Specifications listed in the attached documents, all such deviations and exceptions must be listed here, with complete and detailed conditions and information included. The District will consider any deviations or exceptions in its bid award decisions. The District reserves the right to accept or reject any proposals based upon any deviations indicated below.

If none, please enter N/A (Not Applicable).

(Required: Maximum 4000 characters allowed)

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7

Cooperative Procurement with Other Jurisdictions

This section is optional; it will not affect the agreement.

1) Sales will be made in accordance with the prices, terms, and conditions of the Request for Proposals and any subsequent term agreement.

2) 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.

3) 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.

4) 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.

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

(Optional: Check only one)

1 8	PROPOSAL SCORING CRITERIA PROPOSAL SCORING CRITERIA
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1 9	Evidence of Experience & References with Similar Accounts (Ref & Exp) Evaluation Criteria Evidence of Experience & References with Similar Accounts (Ref & Exp) Consider experience and references listed by the firm/provider. Is the firm/provider experienced in providing services similar to that requested in this RFP? - Familiarity and experience with similar projects. - Consider the number of years of experience the firm/provider has. - Consider the number of years the firm has been in business. - Consider the references given by the firm/provider.
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2 0	Applicable Resources (Personnel Qualifications) Evaluation Criteria Applicable Resources (Personnel Qualifications) Evaluate the extent of applicable resources available to the provider to execute the contract. - Adequacy of proposed number of staff for the district's need. - Consider experience of person(s) assigned to service the district's contract. - Consider the qualifications of the staff proposed.
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2 1	Approach and Understanding of Scope Evaluation Criteria Approach and Understanding of Scope Evaluate the provider's approach to and understanding of the scope of services required in the RFP as evidenced by the vendor's proposal: - 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.
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2
2

Cost

Evaluation Criteria

Cost

Determination of cost and pricing data:

- Consider the amount of time estimated for supplying staff and the fees associated with it.
- Consider whether all elements of pricing conform to the requirements of the RFP.
- Consider the variety of staffing offered.

Supplier Information

Company Name: _____

Contact Name: _____

Address: _____

Phone: _____

Fax: _____

Email: _____

Supplier Notes

By submitting your response, you certify that you are authorized to represent and bind your company.

Print Name

Signature