

Request for Proposals RFP# 24-02

POLICY AUDITING SERVICES



**PROPOSALS WILL BE ACCEPTED UNTIL
10:00 A.M., CST ON TUESDAY, JANUARY 16, 2024**

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NOTICE TO VENDORS

Notice is hereby given that the Monroe City School District (MCSD) will receive sealed proposals for:

Policy Auditing Services

Proposals will be received in the District's Purchasing Office, 2006 Tower Drive, Monroe, La 71201, until 10:00 a.m. Central Standard Time, on Tuesday, January 16, 2024, at which time said proposals will be publicly opened to begin the evaluation process. No facsimile proposals will be accepted.

Each proposal must conform and be responsive to the conditions and specifications. The District reserves the right to reject any and all proposals, to waive any irregularities or informalities in any proposals; to be the sole judge of the merit and qualifications of services offered and to accept proposals it deems to be in the best interest of the District. No late proposals will be accepted. Any proposals received after the deadline will be returned to the vendor unopened.

A full copy of the request for proposal may be obtained by contacting the Purchasing Office at (318) 325-0601 between the hours of 8:00 a.m. and 4:00 p.m. Monday thru Friday or you may obtain an electronic copy via our website at www.mcschools.net/purchasing-and-accounts-payable or through www.bidexpress.com.

<p>Proposals MUST be submitted to:</p> <p>Mr. James Kelley, Purchasing Manager Monroe City Schools 2006 Tower Drive Monroe, LA 71201 Telephone (318)325-0601 x3034 Or electronically by online submission at www.bidexpress.com</p>	<p>Questions MUST be submitted via email to:</p> <p>Mr. James Kelley, Purchasing Manager Monroe City Schools 2006 Tower Drive Monroe, LA 71021 Email: james.kelley@mcschools.net Required Heading: RFP #24-02 Policy Auditing Services Questions</p>
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December 7, December 14, and December 21, 2023

INSTRUCTION AND GENERAL CONDITIONS

PREPARATION OF PROPOSALS

The district invites proposals to be submitted at such time and place as is stated in the Notice to Vendors. All proposals must be submitted in sealed containers bearing on the outside-RFP Policy Auditing Services, name of vendor and complete address of vendor.

Those submitting Proposals do so entirely at their own expense. There is no expressed or implied obligation by MCSD to reimburse any firm or individual for any costs incurred in preparing or submitting proposals, preparing or submitting additional information requested by the MCSD, or for participating in any selection interviews.

DELIVERY OF PROPOSAL

All proposals must be signed, sealed, and then hand delivered or mailed to:

Mr. James Kelley, Purchasing Manager
Monroe City Schools Board
P. O. Box 4180
Monroe, LA 71211-4180

Proposals may also be submitted electronically by online submission at www.bidexpress.com.

NO PROPOSAL ARRIVING AFTER THE CLOSING DATE AND TIME SHALL BE ACCEPTED! It is the vendor's sole responsibility to insure proper delivery.

INQUIRIES

Request for information regarding this RFP, including the procedures, regulations, and/or technical requirements set forth herein, shall be directed only to the MCSD Purchasing Manager. All questions must be in writing via electronic mail (e-mail) and the message must have a subject that contains at a minimum the words "RFP#24-02 Policy Auditing Services" to the following address:

james.kelley@mcschools.net

All questions must be received by the deadline established in the critical date's section. All questions and answers will be shared with all Vendors who have responded to date by posting them on the district website at mcschools.net/purchasing-and-accounts. Any clarification of the RFP documents will be made by an addendum to this RFP and notification will occur via the district website. It is the responsibility of all vendors to monitor the district website for all RFP related documents. The MCSD will issue an addendum in response to clarifications, for any other reasons considered advisable, or in their best interest. Any addendum issued becomes a part of the RFP. Attempts by any qualified Vendor to contact the MCSD in any fashion other than the single point of contact as noted above may be viewed as an infringement on the impartiality of the procurement process and may result in the Vendor being disqualified from this procurement.

SIGNATURE

The proposal must be signed in the name of the vendor and must bear the signature in longhand of the person or persons duly authorized to sign the proposal. Individuals signing the proposal must have the authority to bind the vendor to the terms and conditions of the **RFP**.

ERASURES

The proposal submitted must not contain any erasures or other corrections unless each correction is suitably authenticated by affixing in the margin immediately opposite the correction the surname or surnames of the person or persons signing the proposal.

CHANGE OR WITHDRAWAL PROPOSALS

CHANGE OR WITHDRAWAL PRIOR TO PROPOSAL OPENING. Should any vendor desire to change or withdraw a proposal prior to the scheduled opening, the vendor may do so by making such request in writing to the Purchasing Office. This communication shall be received prior to the date and hour of the proposal opening.

CHANGE AFTER PROPOSAL OPENING BUT PRIOR TO PROPOSAL AWARD. After proposals are opened, they may not be changed except to correct patently obvious mathematical errors or clerical mistakes. Verification of the correct proposal actually intended shall be submitted by the vendor to the Purchasing Office prior to the final award by the Board.

WITHDRAWAL AFTER PROPOSAL OPENING BUT PRIOR TO PROPOSAL AWARD. After proposals are opened, a vendor may request that his proposal be withdrawn for good cause. Such request must be submitted in writing to the Purchasing Office prior to the final award by the Board. If the Purchasing Office agrees that the request is valid, the proposal may be withdrawn. It shall be understood that no proposal can be withdrawn after Board approval without consideration of penalties.

EVALUATION OF PROPOSALS: CRITERIA

Proposals will be evaluated by a committee. The committee will grade and rank all proposals for suitability of prospective contractors. In order to qualify as responsible and responsive, an offeror must meet the criteria as they relate to this Request for Qualification/Proposal.

The evaluation criteria are the following:

Evaluation Criteria

- 1.) Technical Proposal, 15 *pts.*
- 2.) Qualifications, 15 *pts.*
- 3.) Experience, 15 *pts.*
- 4.) Responsiveness to RFP, 30 *pts.*
- 5.) Cost, 10 *pts.*
- 6.) Timeline for Project Completion, 15 *pts.*

AWARD OF CONTRACT

The MCSD reserves the right to reject any or all proposals, or any part thereof, or to waive an irregularities; technicalities, or informalities in any Proposal or in the RFP procedures.

The MCSD expressly states and reserves the right to award a contract to other than the low cost proposal. The award will be made to the firm which in the opinion of the MCSD can best perform the services requested.

Notice is also given of the possibility that an award may be made without discussion/ oral interview. It is therefore, emphasized that all proposals should be submitted initially on the most favorable terms that the proposer can submit.

All proposals received become the property of the Monroe City School District and will not be returned.

Price negotiations will be conducted with the top qualified proposer at the conclusion of the evaluation process and discussions.

CONTRACT AWARD

CONTRACT AWARD DOCUMENT: MCSD will award a contract referencing all terms, conditions and related documents corresponding to this solicitation.

EXCEPTIONS

Any exceptions to terms, conditions, or other requirements in any part of this RFP must be clearly pointed out in the offeror's proposal. Otherwise, the MCSD will consider that all items offered are in strict compliance with the RFP, and the successful proposer will be responsible for Compliance.

COMPETITION INTENDED

It is the Districts' intent that this Request for Proposal (RFP) permits competition. It shall be the offeror's responsibility to advise the Purchasing Manager in writing if any language, requirement, specification, etc. or any combination thereof, inadvertently restricts or limits the requirements stated in this RFP to a single source. Such notification must be received by the Purchasing Manager not later than fifteen (15) days prior to the date set for acceptance of proposals.

OFFICIAL AWARD DATE

Awards become official at the time proposals are accepted by the Board during their regular session.

FILING OF OBJECTION

Any objection to an award by the Board must be filed in writing and must be received by the Purchasing Department no later than 9:00 A.M. on the first Monday following the official award.

NOTIFICATION OF AWARD

The purchase order and/or contract mailed or delivered to successful bidder(s) is the official authorization to begin the conversion process.

INSURANCE REQUIREMENTS

Prior to the commencement of any work under this Contract, the Contractor shall provide the Monroe City School System Manager of Purchasing with a copy of a current Certificate of Insurance insuring the Proposer/Contractor, its agents, and employees against claims arising from the work being performed in conjunction with this contract. This aforementioned insurance policy shall insure the Proposer/Contractor, its agents and employees to the minimum limits of amount as follows:

1. Workers Compensation
 - a. State Statutory
 - b. Employers Liability: \$500,000

HOLD HARMLESS CLAUSE

The TPA shall defend, indemnify and “hold harmless” MSCB from any claim, demand, lawsuit, judgment, cost or expense, including reasonable attorney’s fees, which may arise from any negligent act or omission by TPA in the performance of services under this agreement for MCSD provided, however, that TPA’s obligations and liability under this Section shall not begin until after (a) TPA has completed its compliance review of MCSD’s 403(b) program, (b) MCSD has implemented all recommendations made by TPA with respect to the District’s 403(b) program, and (c) TPA has established the disbursement account and has commenced making disbursements there. TPA shall have no obligations or liability under this Section with respect to the time period before it completes its review hereunder; TPA shall not be responsible for determining the propriety of contributions made after an employee’s termination or employment with the District; TPA shall not be responsible for implementing its recommendations resulting from its compliance review; and TPA shall not be responsible for any act or omission by the District which adversely affects TPA’s ability to act as remitter for the District’s 403(b).

FAILURE TO COMPLY

The MCSD reserves the right to terminate the contract within thirty (30) days’ notice when it is determined by the School Board that the contractor has not provided satisfactory service or materials. Notification of such cancellation will be by U. S. Certified Mail with return receipt requested. Notification of cancellation of service by the Vendor must be done in the same matter.

CRITICAL DATES

Release of RFP	December 7, 2023
Final Date to Email/Fax Questions to MCSB (by 4:00 p.m. CST)	January 5, 2024
Questions/Answers Posted on Web Site/Faxed (by 4:00 p.m. CST)	January 9, 2024
Response Due (by 10:00 a.m. CST)	January 16, 2024
Evaluation Period	Jan 17 th – Jan 19 th 2024
Anticipated Board Approval/Award Date	January 23, 2024

Section I Overview

A. Purpose

Monroe City Schools is seeking competitive proposals from qualified firms or individuals experienced in completing policy audits, in accordance with the terms, conditions, and specifications contained in this Request for Qualification/Proposals (RFP).

B. Background

The Monroe City School District is charged with the provision of public education services in grades K-12 in the City of Monroe, State of Louisiana. The City is located in the northern part of the state. The facilities are spread across 31.6 square miles within the City of Monroe with a population of approximately 51,000. Monroe City Schools serves a population of more than 8,200 students. MCSD manages a portfolio of over 20 buildings, consisting of 6 secondary buildings, 13 elementary schools, one alternative schools, and other administrative support buildings.

C. Vendor Qualifications

The audit/consultant firm should be experienced in auditing policies. To be eligible to respond to this RFP, the proposing firm must demonstrate that they, or the principals assigned to the project, have successfully completed services, similar to those specified in the RFP, for institutions similar in size and complexity to MCSD.

Provide a statement, in the form of an Executive Summary, of Company qualifications including:

- (1) The Offeror must demonstrate experience in auditing policies for K- 12 school systems or similar educational or governmental institutions.
- (2) The Offeror has significant experience in the provision of the services being offered.
- (3) The Offeror should also list any current public bodies that are clients, along with their associated contacts.

D. Inquiries

Questions which arise during the response preparation period regarding issues around this solicitation, purchasing and/or award should be directed, electronically (via Email) and the message must have a subject that contains at a minimum of your company's name and the words "RFP 24-02 Policy Auditing Services Questions" to the following address james.kelley@mcschools.net, U.S. mail, to James Kelley, Purchasing Department, Monroe City Schools, P. O. Box 4180, Monroe, Louisiana 71211-4180. NO INQUIRIES RECEIVED WITHIN TEN DAYS OF THE DATE SET for the opening of the proposals will be given any consideration. Response to questions will be faxed and posted on our web site at www.mcschools.net/purchasing-and-accounts-payable.

Section II Scope of Work

The Monroe City School Board ("School Board") is soliciting Proposals from qualified firms to provide the following services:

1. Performance of an audit of the School Board's personnel files to ensure that all legally required documents are contained in each employee's personnel file.
2. Performance of a thorough and comprehensive review of the critical policies, practices, and procedures of the School Board, including those:
 - a. included in the School Board's Policy Manual.
 - b. involving payroll verification.
 - c. involving the calculation of the salary of the Superintendent of Schools.
 - d. related to terms and conditions of contracts with the Superintendent of Schools.
 - e. concerning approval of contracts with the Superintendent of Schools.
 - f. involving access to, and notification of, access to the personnel files of employees.
 - g. related to verification of entry of annual leave and sick leave in the School Board's payroll system.
3. Preparation of proposed revisions to the policies, practices, and procedures of the School Board, particularly those included Paragraphs 2(a) through (g) above.
4. Preparation of policies, practices and procedures that ensure that all employees of the School Board (including the Superintendent of Schools) are aware of their duties and responsibilities through auditable documentation of signatures on job descriptions and receipt of the School Board's Policy Manual annually.
5. Assisting in the preparation of an unwavering Code of Ethics that specifically identifies honesty, integrity, character, and morals as attributes required of all employees of the School Board, including the Superintendent of Schools.
6. Assisting in the delineation of the responsibilities of General Counsel for the School Board to ensure that, when conflicts of interest arise, they are appropriately addressed and documented.

Section III Proposal Preparation and Submission Requirements

To enable the District to conduct a uniform review process of all response to this Solicitation, components of the proposal shall be submitted as set forth below. The District reserves the right to reject submittals that do not follow the requested format. For mailed and hand delivered proposals submit one original (duly marked), five hard copies, and one electronic copy in PDF format (on a jump drive).

A. Cover Sheet

Sign and submit the completed Bidder Qualification Form at the back of this Request for Proposal.

B. Management Summary

Include a management summary which provides a statement of the vendor's understanding of the services required by the District and an overview of how the vendor would provide these services to the District. Vendors should emphasize why their proposal is best suited to meet the needs of Monroe City School District. This summary must be signed by an official authorized to make representations on behalf of the vendor.

C. Vendor Profile

Provide a Vendor Profile, to include:

1. An overview of the company-address, telephone, and fax numbers; whether company is local, regional, or national firm; areas of specialization.
2. The length of time the vendor has been in business under the present name and structure, any other names under which the vendor has done business, dates it operated under each name, and the locations at which it operated under each name.
3. An outline of the vendor's background and overall qualifications.
4. Identify the firm's professional staff members who will be specifically assigned to this contract, the experience each possesses, and the location of the office from which they work. Provide a detailed biography and/or resume outlining the experience and credentials of all such staff members.
5. A minimum of two client references from similar public body projects, including complete addresses and telephone numbers of each as well as the name, title, and telephone number of a contact person. Describe the contract (the scope and length), for each reference.

D. Proposal Plan

1. Give a detailed, comprehensive presentation of the approach to be used by your firm to accomplish the tasks detailed in the Scope of Work.
2. Specify the information you will require from the Monroe City School District and Staff to enable you to provide this service.
3. This plan must include an estimated time frame.

F. Fee Structure

1. Offeror shall provide pricing for all costs associated with their services, i.e. travel, subsistence, clerical support, etc.

**BIDDER QUALIFICATIONS
(FORM OF BUSINESS ORGANIZATION)**

The form of business organization under which this bid is submitted is as follows:

A CORPORATION incorporated under the laws of the State _____ and
(is)(is not) authorized to do business in the State of Louisiana.

A PARTNERSHIP Name of Partners: _____

AN INDIVIDUAL trading and doing business under a name and style other than his own The Owner's
name is: _____

The undersigned hereby affirms that (1) he/she is a duly authorized agent of the vendor, (2) he/she has read all terms and conditions and technical specifications which were made available in conjunction with this solicitation and fully understands and accepts them unless specific variations have been expressly listed in his/her offer, (3) that the offer is being submitted on behalf of the vendor in accordance with any terms and conditions set forth in this document, and (4) that the vendor will accept any awards made to it as a result of the offer submitted herein for a minimum of ninety calendar days following the date of submission.

(Please Type or Print Below)

LEGAL NAME OF BIDDER _____

MAILING ADDRESS _____

CITY, STATE, ZIP CODE _____

TELEPHONE NUMBER _____

EMAIL ADDRESS _____

FAX NUMBER _____

CONTACT PERSON TITLE _____

AUTHORIZED REPRESENTATIVE (SIGNATURE) _____

NAME (TYPE/PRINTED) _____

TITLE OR SIGNER _____

DATE BID SIGNED _____

ACKNOWLEDGE OF ANY ADDENDA RECEIVED:

ADDENDUM TO: _____ DATE _____

ADDENDUM TO: _____ DATE _____