



PINELLAS PREPARATORY ACADEMY, INC.

REQUEST FOR PROPOSALS **AUDITING SERVICES**

Pinellas Preparatory Academy, Inc. is a not-for-profit agency which operates two public charter schools. While the two schools are operated as independent schools, one organization and one set of corporate processes cover the accounting and financial oversight of the organizations. Due to recent changes with our previous auditor, we are seeing an auditor and are requesting proposals and cost structures for such a contract.

Pinellas Preparatory Academy is our original school, which has been in operation since 2002 and currently enrolls approximately 440 students. Pinellas Primary Academy is a new school started in 2011-2012 with an enrollment of approximately 288 students.

BID REQUEST INFORMATION

Bid Title: Auditing Services

Destination: Pinellas Preparatory Academy, Inc.
2300 S. Belcher Rd.
Largo, FL 33771
Fax: 727-536-3661
Email: amatsumoto-roberts@pinellasprep.org

Bid Due Date & Time: Monday, May 18, 2020

Contact Information: Amanda Matsumoto-Roberts, Pinellas Preparatory Academy Principal
727-536-3600 ext. 2102
amatsumoto-roberts@pinellasprep.org

SPECIFIC INFORMATION REQUESTED WITHIN PROPOSAL

Explanation of Experiences: Preferences will be given to vendors who have experience with charter schools.

Abilities and Backgrounds of Personnel: Vendors should list key personnel who will be responsible for conducting the audit, and provide resumes for those individuals.

Ability to complete the Scope of Work: Vendors should comment on their ability to complete the scope of work listed below, being sure to list any items they do not feel they would be able to complete, and any additional items they are able to provide above the scope.

Detailed Explanation of Costs: Explain in detail how costs are calculated and what the organization can expect to pay for the services provided.

Software Preferences and Cost Expectations: Vendors should detail which software package(s) they will be using and who is responsible for paying for such services. Please also indicate whether school staff would have access to reporting or how reports can be requested.

References: Include references for us to contact regarding services received from vendor.

SCOPE OF WORK

- Prepare annual audits for Pinellas Preparatory Academy, Pinellas Primary Academy, and a combined audit for Pinellas Preparatory Academy, Inc.

GENERAL TERMS & CONDITIONS

Scope: Pinellas Preparatory Academy, Inc. requests proposals from agencies with experience providing outsourced accounting services to charter schools starting as soon as is feasible.

Delivery of Proposals: We prefer all proposals be delivered through email, but may also be delivered by USPS, Fax or delivered directly to the contact information above.

Background Checks: Vendors must agree to comply with the Jessica Lunsford Act, which requests requiring that any entity holding a contract with a public school and meets the any of the following three criteria must go through Level 2 screen, the cost of which we expect the vendor to cover. The types of individuals who must have the background checks are individuals who are:

- are permitted access on school grounds when students are present or
- have direct contact with students or
- have access to or control of school funds

Professional Liability: The successful bidder shall procure and maintain Professional Liability Insurance for the life of this contract/agreement, plus two years after completion. This insurance shall provide coverage against such liability resulting from this contract. The minimum limits of coverage shall be \$1,000,000.00 with a deductible not to exceed \$25,000. The deductible shall be the responsibility of the insured. Professional liability policies shall holds harmless the Pinellas Preparatory Academy and each officer, agent and employee of the school against all claims, against any of them, for personal injury or wrongful death or property damage arising out of the negligent performance of professional services or caused by an error, omission or negligent act of the awarded bidder or anyone employed by the awarded bidder.

Non-Exclusive Agreement: This RFP does NOT establish an exclusive arrangement between the school and vendor. The school reserves, but is not limited to, the following rights:

- The right to use others to perform work and services described in this RFP;
- The right to request proposals from other Vendors for work described in the RFP;
- The unrestricted right to bid any work or services described herein.

Confidentiality of Information: The school reserves the right to retain all copies of vendor proposals submitted in response to this Request for Proposals. You are hereby notified that under FS 119.07, ("Florida's Sunshine Law") proposals submitted in response to this solicitation cannot be granted immunity from public scrutiny. All information submitted must be made available to the public for examination, if so requested. Vendor requests to hold certain submitted materials in confidence cannot be honored. If it is essential to your organization that certain materials be kept confidential, and they are a required element of this Request for Proposal, it is recommended that you decline to respond to this solicitation.

Qualifications of Vendors & Eligibility Requirements: The school expressly reserves the right to reject any proposal if it determines that the business and technical organization, equipment,

financial and other resources, or experience of vendor, compared to work proposed, justifies such rejection.

Proposal Preparation Costs: The costs of developing proposals are entirely the responsibility of the vendor, and shall not be charged in any manner to the school. This includes, but is not limited to, the direct cost of vendor personnel assigned to prepare vendor's response to the RFP and any out-of-pocket expense (including, but not limited to, travel, accommodation, supplies) incurred by vendor in preparing the response to the RFP.

Fiscal Information: Vendors may request previous audits and financial information such as our budget to assist in preparing their proposals. However, all of this information is readily available online at www.pinellasprep.org. Requests can also be directed to Amanda Matsumoto-Roberts at the contact information listed above.

Solicitation of School Employees: The school expressly prohibits vendors from making any offer of employment, equivalent offer or any other offering of value to any employee or representative of the school.

Lobbying: Respondents are hereby advised that lobbying is not permitted with any school personnel or Board members related to or involved with this RFP. All oral or written inquiries must be directed through Donna Hauser to the Budget Committee which will be evaluating the proposals received. Lobbying is defined as any action taken by an individual, firm, association, joint venture, partnership, syndicate, corporation, and all other groups who seek to influence the governmental decision of a Board member or school personnel on the award of this contract. Any respondent or any individuals that lobby on behalf of respondent may result in rejection or disqualification of said proposal.

Ownership of Work Products The school shall have ownership rights, including copyrights and patents, to all work products developed for the school by the vendor.

Key Events & Dates:

- Monday, May 11, 2020Request for Proposals posted on school’s web site and bid notices mailed to prospective bidders
- Monday, May 18, 2020.....Proposals due by 8:00 AM. Committee will evaluate and contact top bidders it wishes to negotiate with late March.
- Tuesday, May 26, 2020.....Recommendation will be made to Board of Directors

Taxes: Purchases are exempt from all federal excise and state sales taxes.

Inquiries / Information: Any questions by prospective bidders concerning requirements of this bid should be addressed to Amanda Matsumoto-Roberts, contact information above.

Florida State Contracts: If a company currently holds a contract with the State of Florida, Department of Management Services, Division of Purchasing or the Florida Department of Education, to supply the products or services requested in this bid, the bidder shall quote not more than State contract price(s). Failure to comply with this request may result in disqualification. The Board reserves the right to reject bids and purchase from State contracts if to do so represents its best interest.

Basis of Award or Rejection of Bids: The Budget Committee will recommend the lowest responsive and responsible bidder to the Board. Slight variations or irregularities may be accepted by the Board if either is found to be in its best interest. The Budget Committee shall be responsible for determining the acceptability of a bid. The Board reserves the right to reject any or all bids, either in part or in whole.

Contract Termination: The Pinellas Preparatory Academy, Inc. Board of Directors reserves the right to terminate a vendor’s contract for just cause, without penalty. The Chairman (or designee) will notify the vendor of the intent to terminate, in writing, at least (30) days prior to the effective date of the termination, and the contract will officially terminate at the end of the (30) day grace period. The vendor may request reconsideration of this decision in writing at any time during the 30 day grace period. The request must be addressed to the Organization’s Superintendent who will initiate an internal review of the matter. If the vendor’s input is required as part of the reconsideration process, the vendor will be notified when and where to appear. Requests for reconsideration received after the (30) day grace period will be denied.

Evaluation Criteria: The following factors will be considered in ranking the proposals received:

Explanation of Criteria	Possible Points
Understanding of task and proposed plan	+ 0 to 10
Experience & qualifications of firm <i>Experience with Charter Schools</i>	+ 0 to 5
<i>Experience with governmental entities</i>	+ 0 to 5
Experiences & qualifications of personnel <i>Primary Contact</i>	+0 to 15
Ability to meet the “Scope of Work”	+0 to 17 <i>(one point for each item identified within the Scope of Work)</i>
Services above and beyond Scope of Work	+0 to 8
References	+0 to 5 <i>for each positive reference (max 20 points)</i>
Costs	+ 20 <i>for lowest rate</i> +15 <i>for second lowest rate</i> +10 <i>for third lowest rate</i> +0 <i>all others</i>