

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT

Invitation for Bids

for

SCHOOL BUSINESS MANAGEMENT SERVICES (FY21)

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Invitation for Bids,

for

School Business Management Services (#FY21-1) (July 1, 2020-June 30, 2021)

I. GENERAL INFORMATION AND BID SUBMISSION REQUIREMENTS

A. Bids delivery, award, and addenda information

1. All bids must be delivered to the Superintendent's Office, 491 Berkshire School Road, Sheffield, MA 01257 on or before 2:00 p.m. Monday, June 22, 2020. Hand delivery is recommended, following all social distancing protocols, as delivery services may not arrive by 2:00 p.m.

2. Bids will be accepted up until 2:00 p.m. Monday, June 22, 2020.

3. Bids will be publicly opened and read at that time.

4. The contract will be awarded within thirty days after the bid opening. The time for award may be extended for up to 45 additional days by mutual agreement between the School District and the apparent responsive and responsible bidder offering the lowest price for the services specified in this IFB.

5. If any changes are made to this IFB, an addendum will be issued. Addenda will be emailed or faxed to all bidders on record as having picked up the IFB.

6. Questions concerning this invitation for bids must be submitted in writing. Questions by facsimile will be accepted as long as they are submitted with information for the Southern Berkshire Regional School District to verify receipt of facsimile to: Southern Berkshire Regional School District, Attention: Superintendent, 491 Berkshire School Road, Sheffield, MA 01257. Fax number is 1-413-229-2913.

7. A bidder may correct, modify, or withdraw a bid by written notice received by the School District prior to the time and date set for the bid opening. Bid modifications must be submitted in a sealed envelope clearly labeled "Modification No. _." Each modification must be numbered in sequence and must reference the original IFB and Bid No. FY20-1. After the bid opening, a bidder may not change any provision of the bid in a manner prejudicial to the interests of the School District or fair competition. Minor informalities will be waived, or the bidder will be allowed to correct them. If a mistake and the intended bid are clearly evident on the face of the

bid document, the mistake will be collected to reflect the intended correct bid, and the bidder will be notified in writing; the bidder may not withdraw the bid. A bidder may withdraw a bid if a mistake is clearly evident on the face of the bid document, but the intended correct bid is not similarly evident.

8. The District may cancel this IFB or reject in whole or in part any and all bids, if the District determines that cancellation or rejection serves the best interests of the District. All bid prices submitted in response to this IFB must remain firm for forty-five (45) days following the bid opening.

9. If, at the time of the scheduled bid opening, Superintendent's Office is closed due to uncontrolled events such as fire, snow, ice, wind, or building evacuation, the bid opening will be postponed until 2:00 p.m. on the next normal business day. Bids will be accepted until that date and time.

10. All bidders must submit the following:

- a. Two copies of the bid in a sealed envelope
- b. Envelope should be marked "**BID - SCHOOL BUSINESS MANAGEMENT SERVICES (FY21-1)**"
- c. Bids must include signed:
 - Certificate of Non-Collusion
 - Tax Compliance Certification
 - Conflict of Interest Certification
 - Certificate of Compliance with MGL c151B
 - Certificate of Non-Disbarment
 - Certification of all items, a-k, on page 11 of this IFB
- d. Certificate of insurance meeting the following minimum requirements. The successful bidder shall keep in force throughout the term of the Contract and any extension or renewal thereof the amount of insurance indicated below. SBRSD shall be named as an additional insured on such policies.

A. General Liability Insurance	\$1,000,000
B. Workers Compensation	\$1,000,000
C. Vehicle	\$1,000,000
- e. Bids must be signed by authorized individual(s)

II. PURCHASE DESCRIPTION/ SCOPE OF SERVICES

A. Description

I. The Southern Berkshire Regional School District, in accordance with M.G.L. Ch.30B, is looking for school business management services. This includes: (1) budget development and preparation; (2) all aspects of financial management and reporting; (3) grants and other supplemental funding sources management; (4) the completion of all required financial reports; (5) assisting the superintendent, administration, and school committee in managing the school resources; and (6) working with independent auditors on the annual audit.

2. Bidders must be able to provide monthly financial reports to those with budget authority and the school committee, including information on grants and supplemental funding sources as requested. These reports must be available to the school district within 10 days after the last day on the month.

3. The Commonwealth of Massachusetts Department of Elementary and Secondary Education (DESE) End of Year Pupil and Financial Report must be filed by the required deadline.

a. NOTE: The due date of this report is September 30 of the following fiscal year (as required by the DESE pursuant to Section 3 of MGL Chapter 72). The district may, at the Superintendent's discretion, reduce the payment of the October through June invoices by up to a maximum of \$20 per day for each day that the vendor is delinquent in meeting the September 30 deadline for the filing of this report.

4. Bidders must have or develop a web-based system for reporting and sharing information to be determined by the Superintendent and in conjunction with the bid award winner.

a. Examples include monthly reports for budgets, grants, revolving accounts, enrollment, capital and student achievement data.

b. Bidders must have appropriate security and confidentiality systems in place.

5. The awarded vendor will be expected to have a representative attend school committee meetings and subcommittee meetings as scheduled, as well as all Annual Town Meetings in all five member towns.

6. The awarded vendor will be expected to act as a liaison for the school department to the member towns Finance Committees and attend meetings with town officials as needed.

7. The awarded vendor will be expected to have a representative on-site at least twice per week, on a mutually agreed upon day between the Superintendent and the vendor.
8. The awarded vendor must be able to provide appropriate guidance to the School Committee and the Superintendent with regard to all Local, State, and Federal funds.
9. The awarded vendor will be expected to provide appropriate guidance to the School Committee and Superintendent with regard to 3.0B procurement regulations.

B. Contract Terms, Renewal Options, and Pricing

1. The contract will run from July 1, 2020 until June 30, 2021.
2. Annual price will be based on a monthly fee.
 - a. For additional services, above and beyond the services enumerated in IIA, bidders will be required to provide an hourly rate.
 - b. See Bid Pricing sheet in Section VI.
3. This document is the entire contract. There are no other agreements other than those incorporated herein.

III. QUALITY REQUIREMENTS

A. Purchase Quality Requirements

I. Bidders must provide all of the items described in **Section II: Scope of Services.**

B. Bid Submission Requirements

I. Bidders must comply with all the bid submission requirements listed in **Section I.**

2. Bidders must have a minimum of three years of experience with the financial accounting system (Infinite Visions) used by the Southern Berkshire Regional School District.

IV. REFERENCE FORM

Bidder: _____

IFB Title: _____

Bidder must provide references for:

References must have knowledge of the bidder's ability to perform school business management services. References must have worked with or employed the bidder in the past two years.

- Reference: _____
Address: _____
Contact: _____
Phone: _____
Fax: _____

- Reference: _____
Address: _____
Contact: _____
Phone: _____
Fax: _____

- Reference: _____
Address: _____
Contact: _____
Phone: _____
Fax: _____

Attach additional sheets if necessary

V. RULE FOR AWARD

The contract will be awarded to the responsive and responsible bidder who meets our quality requirements and offers the lowest price. The lowest price will be based on the total base price for all required services over the year.

VLBID PRICING SHEET

NOTE: FOR FISCAL YEAR 2021 (JULY 1, 2020 TO JUNE 30, 2021) PLEASE QUOTE A TOTAL PRICE FOR THE YEAR.

TOTAL CONTRACT PRICE (7/1/20-6/30/21):

Based on monthly fee of _____

TOTAL HOURLY RATE for ADDITIONAL SERVICES: _____

VII.CERTIFICATIONS

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of individual submitting bid or proposal

Name of business

TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Signature of individual submitting bid or proposal

Name of business

CONFLICT OF INTEREST CERTIFICATION

The Bidder hereby certifies that:

The Bidder has not given, offered, or agreed to give any gift, contribution, or offer of employment as an inducement for, or in connection with, the award of a Contract pursuant to this Invitation for Bids.

No consultant to, or subcontractor for, the Bidder has given, offered, or agreed to give any gift, contribution, or offer of employment to the Bidder, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a Contract by the Bidder.

No person, corporation, or other entity, other than a bona fide full time employee of the Bidder has been retained or hired to solicit for or in any way assist the Bidder in obtaining the Contract (pursuant to this IFB) upon an agreement or understanding that such person, corporation or entity be paid a fee or other compensation contingent upon the award of a Contract to the Bidder.

The Bidder understands that the Massachusetts Conflict of Interest Law, Chapter 268A of the Massachusetts General Laws, applies to the Bidder with respect to the transaction outlined in the IFB.

The Bidder understands that the Bidder, his/her/its officers, employees, agents, subcontractors, and affiliated entities, shall not participate in any activity which constitutes a violation of the Massachusetts Conflict of Interest Law or which creates an appearance of a violation of the Massachusetts Conflict of Interest Law.

Signature of individual submitting bid or proposal

Name of business

CERTIFICATE OF COMPLIANCE WITH M.G.L. c.151B

The Bidder hereby certifies that it is in compliance with and shall remain in compliance with Massachusetts General Laws (M.G.L.) Chapter 151B and shall not discriminate on any prohibited basis outlined therein.

Signature of individual submitting bid or proposal

Name of business

CERTIFICATE OF NON-DEBARMENT

The Bidder hereby certifies that it is presently not debarred, suspended, or otherwise prohibited from practice by any federal, state, or local agency, _and that, should any proceeding arise in which it is debarred, suspended, or otherwise prohibited from practice by any federal, state, or local agency, the Bidder shall inform the District of SBRSD within one (1) business day of such debarment, suspension, or prohibition from practice.

Signature of individual submitting bid or proposal

Name of business

Bidder Certifies as Follows:

1. A fully executed and completed Bid Form (**Section VI**) which shall include certification of the following:
 - a. Bidder is an established business with a minimum of five (5) years of experience in providing services related to School Business Management Services. (Bidder shall attach to the Bid Form a short statement of the status of the business, the year of incorporation/commencement a list of any name changes, and a list of any lawsuits pending against Bidder.)
 - b. Bidder holds all applicable State and Federal permits, licenses and approvals. (Bidder shall attach to the Bid Form copies of all applicable State and Federal permits, licenses, and approvals.)
 - c. Bidder provides supervision of all workers performing under all Contracts held and pledges to provide such supervision under any Contract with the District.
 - d. Bidder holds all applicable documentation and Insurance in accordance with this IFB. (Bidder shall attach to the Bid Form copies of relevant insurance certificates hereto.)
 - e. Bidder shall provide a list of at least three (3) successfully completed jobs in such time, giving the name and address of these projects.
 - f. Bidder has not defaulted on any Contract within the last five (5) years.
 - g. Bidder has not failed to perform satisfactorily on Contracts of a similar nature.
 - h. Bidder maintains a permanent place of business. (Bidder shall attach to the Bid Form the address of his/her/its business.)
 1. Bidder is registered with the Secretary of the Commonwealth of Massachusetts to do business in Massachusetts. (Bidder shall attach to the Bid Form a copy of a Letter of Good Standing from the Secretary of the Commonwealth's Office.)
 - j. Bidder possesses the skill, ability and integrity necessary for the faithful performance of the work.
 - k. Bidder is able to furnish labor that can work in harmony with all other elements of labor employed or to be employed in the work.

Signature of individual submitting bid or proposal

Name of business