

Hadley Public Schools Request for Proposals for School Business Management Services (FY19)

1. Introduction

Hadley Public Schools is requesting proposals for school business management services. In addition to budget development, administration, implementation and overall fiscal management of the district, Hadley Public Schools is seeking a vendor who will be proactive in helping Hadley Public Schools identify potential sources of revenue, improve resource management systems to maximize efficiency and effectiveness, and prepare budget and financial documents that meet or exceed standards of excellence set forth by the Association of School Business Officials and the Government Finance Officers Association. It is intended that the successful proposer will be the driving force behind improved efficiency, working in partnership with the Superintendent of Schools and Hadley School Committee.

The successful proposer must meet the following objectives:

1. Seek continual improvement in accurate financial reporting and efficient utilization of resources;
2. Under the direction of the Superintendent of Schools and School Committee, prepare budget documents that meet criteria set forth by the Association of School Business Officials;
3. Manage all grants and donations according to state and federal guidelines;
4. Complete all required financial reports to local, state, and federal governments and submit in accordance with required timelines;
5. Assist the Superintendent and School Committee in managing and allocating resources effectively;
6. Ensure compliance with all purchasing, procurement, and accounting regulations and standards set forth by local, state, and federal governments and in accordance with the Government Accounting Standards Board.

Hadley Public Schools has approximately 133 employees and has a budget of \$8,368,000.

2. Instructions

The timeline for selection process is presented below. Complete responses must be delivered to the Superintendent’s Office, 125 Russell Street, Hadley, MA on or before Wednesday, June 6, 2018 at 2:00PM. No faxed or electronic submissions will be accepted. Upon award of the proposal, Hadley will enter into a contract with the selected proposer with services beginning July 1, 2018.

	DATE	ACTION
1.	05/25/2018	2:00PM Deadline for submission of questions on RFP
2.	05/29/2018	Summary of questions and comments posted on www.hadleyschools.org
3.	06/06/2018	Proposals due by 2:00PM in Superintendent’s Office 125 Russell St. Hadley, MA

The RFP for School Business Management Services is published on the website for Hadley Public Schools: www.hadleyschools.org. All information and file attachments are hereby incorporated by reference into the solicitation and resulting contract. It is the responsibility of every proposer to

check the website of Hadley Public Schools for any addenda or modifications by monitoring the “Last Change” section of the purchasing and procurement page to ensure that they have the most recent information. Hadley Public Schools and the Town of Hadley accept no liability and will provide no accommodation to vendors who submit a proposal based on an out-of-date solicitation document.

No faxed or electronic submissions of proposals will be accepted. Sealed proposals on forms furnished by the Awarding Authority will be received no later than **2:00PM, Eastern Standard Time, 06/06/2018 in the Superintendent’s Office, 125 Russell St., Hadley, MA**. Proposals will be publicly opened and read at that time.

Instructions for Submitting Envelopes: All proposers must submit **two separate sealed envelopes**. All technical and qualification information must be submitted in two (2) copies in a sealed envelope marked, “BUSINESS MANAGEMENT NON-PRICE PROPOSAL”. This envelope shall contain all technical and required forms, narrative, quality proposals, and all other information, except the price form.

All non-price proposals must include a non-collusion form, tax compliance certificate, and (in the case of corporations) a certificate of corporate votes. All proposals must be signed by an authorized individual(s).

The price must be submitted in two (2) copies in a separate sealed envelope marked ‘BUSINESS MANAGEMENT PRICE PROPOSAL’.

All sealed proposals must be received and registered by the Superintendent’s office by June 06, 2018 at 2:00 p.m. All outer envelopes must be labeled as per above instructions and mailed or hand delivered to the following address:

Anne McKenzie, Superintendent
Hadley Public Schools
125 Russell Street
Hadley, MA 01035

No proposals will be accepted after the time and date noted. Late delivery of materials due to any type of delivery system shall be cause for rejection. If on the date and time of the submittal deadline the Superintendent’s is closed due to an uncontrolled event such as fire, snow, ice, wind or building evacuation, the submittal deadline will be postponed until 2:00 p.m. on the next normal business day.

Each proposal must be enclosed in sealed envelope clearly marked with the name and address of the proposer and title of proposal. Any proposal received after the time and date specified will not be considered.

The contract will be awarded within 30 days after the opening. The time for award may be extended for 45 additional days by mutual agreement between the School District and the awarded proposer.

All inquiries about this RFP must be made in written form, via e-mail, to the primary contact person of Hadley Public Schools:

Anne McKenzie, Superintendent
125 Russell Street, Hadley, MA
amckenzie@hadleyschools.org

A correction, modification, or withdrawal of a proposal must be by written notice received by the School District prior to the time and date set for opening. Modifications must be submitted in a sealed envelope clearly labeled "Modification No. ____" Each modification must be numbered in sequence. After the opening, a proposer may not change any provision of the estimate in a manner prejudicial to the interests of the School District or fair competition. Minor informalities will be waived or the proposer will be allowed to correct them. If a mistake and the intended estimate are clearly evident on the face of the document, the mistake will be corrected to reflect the intended correct proposal, and the proposer will be notified in writing, the proposer may not withdraw the proposal. A proposer may withdraw the proposal if a mistake is clearly evident on the face of the document, but the intended correct estimate is not similarly evident.

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

Hadley Public Schools, at its sole option, will select the proposal which best fulfills the requirements and provides the **best value** to Hadley Public Schools. The proposals will be evaluated based on the following criteria (criteria are not in order of ranking or weighting)

- Submission Requirements (Section 2.2)
- Program Management Description (Section 4.1))
- Qualifications (Section 4.2)
- Proposal Presentation (quality and completeness of response)

2.2 Reservations and Limitations

Hadley Public Schools may request additional information by suppliers, including a presentation if needed, to clarify elements of their proposal proposals. Hadley Public Schools also reserves the right to make independent investigations as to the qualifications of each proposer, including contacting existing customers or site visits to existing operations.

Hadley Public Schools reserves the right to waive any informality in or to reject any and all proposals if it be in the public interest to do so.

2.3 Contractors Liability Insurance

The contractor must take out and maintain liability and property damage liability insurance in no less than the following amounts.

- 1) General Liability of at least \$1,000,000 Bodily Injury and Property Damage Liability, Combined Single Limit with a \$3,000,000 Annual Aggregate Limit. The Town of Hadley should be named as an "Additional Insured". Products and Completed Operations should be maintained for up to 3 years after the completion of the project.
- 2) Automobile Liability (applicable for any contractor who has an automobile operating exposure) of at least \$1,000,000 Bodily Injury and Property Damage per accident. The Town of Hadley should be named as an "Additional Insured".
- 3) Workers' Compensation Insurance as required by law.
- 4) Professional Liability (applicable for any architects or engineers involved in the project) of at least \$1,000,000/occurrence, \$3,000,000 aggregate. The Town of Hadley should be named as an Additional Insured.
- 5.) Property Coverage for materials and supplies being transported by the contractor.
- 6.) Umbrella Liability of at least \$2,000,000/ occurrence, \$2,000,000/aggregate. The Town of Hadley should be named as an Additional Insured.

Please be advised that the above requirements are the minimum insurance limits for contractors to carry while working on behalf of the Town of Hadley. It is the Town's decision as to whether higher limits are needed.

Upon award of contract a current insurance certificate must be provided in the amounts indicated above. The contractor awarded the contract must sign a hold harmless agreement with the Town of Hadley.

3. Scope of Work

3.1 Description

The Hadley Public School District, in accordance with M.G.L. Ch. 30B, is looking for part-time school business management services. These services will be for a minimum of one day per week, and may, with prior approval of the Superintendent, not exceed the equivalent of two days per week. Services include: (1) budget development and preparation; (2) all aspects of financial management and reporting; (3) grants and other supplemental funding sources management; (4) completion of all required financial reports; and (5) assistance to the superintendent, administration, and school committee in managing the school resources.

There must be the ability to provide monthly financial reports to those with budget authority and the school committee, including information on grants and supplemental funding sources as requested.

The Department of Elementary and Secondary Education End of Year Pupil and Financial Report must be filed by the required deadline.

NOTE: The due date of this report is September 30 of the following fiscal year.

The Hadley Public Schools will withhold two-thousand dollars from the June invoice until submission of the report.

Hadley Public Schools expects the business management provider to attend at least one school committee meeting per month, as well as all Annual Town Meetings. Additional meetings, as appropriate, may be requested by the Superintendent.

Hadley Public Schools expect the business management provider to act as a liaison for the school department to the town of Hadley Finance Department.

Proposers will be expected to be on-site at least once per week, on a mutually agreed upon day between the Superintendent and the proposers.

3.2 Contract Terms, Renewal Options, and Pricing

The contract will run from July 1, 2018 until June 30, 2021.

The contract may be renewed each of two additional years, July 1, 2019 to June 30, 2020 and July 1, 2020, to June 30, 2021

4. Proposal Response Requirements

Each proposer must address the following:

4.1 General Requirements: Program Management Description – Business Management Non Price Proposal

Provide a brief description of your qualifications as it pertains to the following:

- Describe evidence of your capacity to provide all of the items delineated in Section 3, Scope of Work.
- Provide evidence of a minimum of three years experience with school district financial management and be certified as a Business Administrator by the Massachusetts Department of Elementary and Secondary Education, or eligible for certification
- Identify what resources (project personnel or teams) that you will devote to Hadley Public Schools.
- List three of your current major customers. Include at least one district that you provide services to that are comparable to Hadley Public Schools' requirements. For each customer named, indicate: a) number of years as a customer; b) contact names and numbers; c) services your company provides and relevant metrics of success.
- Complete and submit Certificate of Non-Collusion (Appendix B)
- Complete and submit Tax Compliance Certification (Appendix C)

Business Management Price Proposal

- Complete and submit Pricing Sheet (Appendix A).

4.2 Quality Requirements

- Proposers must have a demonstrated capacity to provide all of the items delineated in Section 3, Scope of Work.

- Proposers must have a minimum of three years experience with school district financial management and be certified as a Business Administrator by the Massachusetts Department of Elementary and Secondary Education, or eligible for certification.

4.3 Submission Requirements

Proposers must comply with all submission requirements delineated in Sections 2, 3, and 4.

5. Performance Targets

Contractor will be expected to meet all criteria set forth in Section 3, Scope of Work. Failure to comply with expectations set forth in the RFP document may result in early termination of contract.