



BRUNSWICK COUNTY SCHOOLS

35 Referendum Drive • Bolivia, North Carolina 28422 • Phone: 910-406-5100 • Fax: 866-293-0649

Letter of Instruction For RFP #153.CS.25.FINANCE.2

To: Prospective Parties

Thank you for your interest in the Brunswick County Schools. Please review the following instructions prior to submitting your proposal.

- All submittals must be organized and indexed according to the section number and required subject matter. The information contained in your submittal should be indexed and easily accessed by Brunswick County Schools. Brunswick County Schools is not required to seek clarification on any proposal that does not meet these minimum requirements.
- Prior to submitting and executing the proposal, please make sure you read and understand the terms and conditions referenced. All proposals are subject to the terms and conditions outlined herein. All responses will be controlled by such terms and conditions and the submission of other terms and conditions, price lists, catalogs, and/or other documents as part of an offeror's response will be waived and have no effect either on this Request For Proposals or on any contract that may be awarded resulting from this solicitation. The attachment of any other terms and conditions by the Offeror may be grounds for rejection of that proposal. Offeror specifically agrees to the conditions set forth in the above paragraph by signature to the proposal.
- Brunswick County Schools will adhere to strict deadlines as indicated in the solicitation document and thus will not make exceptions to these dates and times.
- Please read carefully the section titled CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING THE RFP PROCESS. All questions should be directed to Dale Cole.
- Offerors are cautioned that this is a request for offers, not a request to contract, and Brunswick County Schools reserves the unqualified right to reject any and all offers when such rejection is deemed to be in the best interest of Brunswick County Schools.
- If acceptable offers are received, Brunswick County Schools intends to enter into a one year contract with an option to renew for two consecutive years.
- In submitting a proposal, the Offeror agrees not to use the results therefrom as part of any news release or commercial advertising.
- Submit one (1) signed, original executed proposal responses, along with 2 photocopies and 1 electronic copy (emails not accepted) of your proposal simultaneously to the address identified below.

Cherie Wisse, Chief Finance Officer

Clearly mark each package with: (1) Vendor name; (2) the RFP number; and (3) the due date. Address the package(s) for delivery as shown in the table below. If Vendor is submitting more than one (1) proposal, each proposal shall be submitted in separate envelopes and marked accordingly. For delivery purposes, separate envelopes from a single Vendor may be included in the same outer package. Proposals are subject to rejection unless submitted with the information below included on the outside of the proposal package.

<u>DELIVER TO: Brunswick County Schools Finance Department</u>
PROPOSAL NO. RFP 153.CS.25.FINANCE.2
Brunswick County Schools Finance Department Attn: Cherie Wisse 35 Referendum Drive Bolivia, NC 28422
Bid Due Date: August 13, 2024 prior to 2:00pm

Refer <u>ALL</u> Inquiries to: Dale Cole	Commodity: Legal Services
Telephone No: 910.782.5082	
E-Mail dcole@bcswan.net	Using Agency Name: Brunswick County Schools

NOTICE TO VENDORS

Sealed Proposals, subject to the conditions made a part hereof, will be received at this office until **2:00 p.m.** on the day of opening and then opened, for furnishing and delivering the commodity as described herein.

Proposals submitted via facsimile (FAX) machine in response to this Invitation for Proposals **will not** be acceptable. Proposals are subject to rejection unless submitted on this form.

EXECUTION

In compliance with this Invitation for Proposals, and subject to all the conditions herein, the undersigned offers and agrees to furnish and deliver any or all items upon which prices are proposed, at the prices set opposite each item within the time specified herein. By executing this proposal, I certify that this proposal is submitted competitively and without collusion (G.S. 143-54), that none of our officers, directors, or owners of an unincorporated business entity have been convicted of any violations of Chapter 78A of the General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and that we are not an ineligible vendor as set forth in G.S. 143-59.1. False certification is a Class I felony.

Failure to execute/sign proposal prior to submittal may render bid invalid. Late proposals are not acceptable.

VENDOR:		FEDERAL ID OR SOCIAL SECURITY NO.	
STREET ADDRESS:		P.O. BOX:	ZIP:
CITY & STATE & ZIP:		TELEPHONE NUMBER:	TOLL FREE TEL. NO (800)
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE			
TYPE OR PRINT NAME & TITLE OF PERSON SIGNING:		FAX NUMBER:	
AUTHORIZED SIGNATURE:	DATE:	E-MAIL:	

Offer valid for 60 days from date of proposal opening unless otherwise stated here.

Submit **one (1) signed, original executed** proposal response, along with 2 photocopies and 1 electronic/digital copy via flash drive (emails not accepted) of your proposal simultaneously to the address identified above.

RFP SCHEDULE

The table below shows the *intended* schedule for this RFP. Brunswick County Schools will make every effort to adhere to this schedule.

Event	Responsibility	Date and Time
Issue RFP	BCS	7/30/2024
Attend Non Mandatory Pre-Proposal Meeting	Vendor	N/A
Questions submitted to dcole@bcswan.net (Reference RFP # in subject line)	Vendor/BCS	Before 5:00pm - 8/7/2024
Provide Response to Questions	BCS	Before 5:00pm - 8/9/2024
Submit Proposals	Vendor	Before 2:00pm – 8/13/2024

PROPOSAL QUESTIONS

Upon review of the RFP documents, Vendors may have questions to clarify or interpret the RFP in order to submit the best proposal possible. To accommodate the Proposal Questions process, Vendors shall submit any such questions, in written form by the above due date. Brunswick County Schools will not respond to questions via telephone or telephone message(s). Written questions shall be emailed to dcole@bcswan.net prior to the date and time specified above. Vendors should enter “RFP # 153.CS.25.FINANCE.2 Questions” as the subject for the email. Questions submittals

should include a reference to the applicable RFP section and be submitted in the format shown below:

Reference	Vendor Question
RFP Section, Page Number	Vendor question ...?

No information, instruction or advice provided orally or informally by any Brunswick County Schools personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. **Vendors shall rely only on written material contained in an Addendum to this RFP.** Questions received prior to the submission deadline date, Brunswick County Schools' response, and any additional terms deemed necessary by Brunswick County Schools will be posted in the form of an addendum. Vendors who wish to receive addended information should submit their requests to dcole@bcswan.net.

Proposal Evaluation

All proposals will be evaluated by representatives of Brunswick County Schools. Brunswick County Schools may, at its sole discretion, ask for additional information and/or elect to conduct interviews with finalists to clarify information provided in the proposals.

The Legal Services that are the subject of this RFP are not required to be bid under North Carolina law, and none of the statutory requirements regarding public bidding apply to this RFQ/P.

Brunswick County Schools shall not be required to award the contract to the lowest proposed compensation; nor shall Brunswick County Schools have any obligation to explain its decision to recommend or not to recommend any particular vendor or to invite or exclude any particular vendor from consideration at any stage of the process. Instead of recommending that contracts be awarded to one or more vendors who presented proposals, Brunswick County Schools may, at its sole discretion, reject the proposals and repeat the process, enter into direct contract negotiations with one or more vendors or take any other action Brunswick County Schools deems advisable under all the circumstances.

Brunswick County Schools is expected to make any final selection(s) based on evaluation criteria specified in this proposal.

Factors often considered include qualifications, relevant experience, fee, and ability to perform work in a timely manner. Brunswick County Schools retains sole discretion to award the contract to the vendor(s) it believes will best serve the interests of Brunswick County Schools based on criteria specified in this proposal. Brunswick County Schools shall not have any obligation to explain its decision to select or not select any individual vendors or to invite or exclude any individual vendors from consideration at any stage of the process. The decision of Brunswick County Schools to accept or reject any proposals and to award contract(s) to any one or more vendor(s) shall be final and not subject to further review.

Vendors are subject to *immediate disqualification* at any stage of the selection process for any of the following:

The submission of false or misleading information in the vendor's proposal.

- Any efforts to dissuade or discourage other vendors from submitting proposals.
- Any efforts to influence, dictate, or change the terms of another vendor's proposal.
- Any form of bid collusion or bid rigging.

Prohibited Communications and Confidentiality

COMMUNICATION: Each vendor submitting a proposal (including its representatives, subcontractors and/or suppliers) is prohibited from having any communications with any person outside of the School department issuing this RFP. A vendor not in compliance with this provision may be disqualified from contract award.

RFP 153.CS.25.FINANCE.2 – Legal Services

ACKNOWLEDGMENT OF ADDENDA

As the person authorized to sign the statement, I certify that this firm acknowledges any and all addenda that may have been issued as part of this proposal.

ADDENDUM No. _____	Dated _____
ADDENDUM No. _____	Dated _____
ADDENDUM No. _____	Dated _____
ADDENDUM No. _____	Dated _____
ADDENDUM No. _____	Dated _____

Applicant's Signature

Date

LEGAL SERVICES

General Conditions for Submitting Proposals

- **Unsolicited Proposal Changes**

Any change to a proposal which is received after the closing date of this RFP and which is not specifically solicited by the Brunswick County Schools system, will be rejected.

- **Costs for Proposal Preparation**

Any costs incurred by vendors in preparing or submitting offers are the vendor's sole responsibility; the BRUNSWICK COUNTY SCHOOLS will not reimburse any vendor costs incurred prior to award.

- **Oral Explanations**

The BRUNSWICK COUNTY SCHOOLS will not be bound by oral explanations or instructions given at any time during the competitive process or after award.

- **Proprietary or Other "Confidential" Information**

Any trade secrets or other similar proprietary data that the vendor does not wish disclosed beyond the Brunswick County Schools personnel involved in the evaluation or contract administration will be kept confidential if identified as described below:

Any section of the proposal, which is to remain confidential, must be marked "confidential." Cost information and other information that is considered public information may not be deemed confidential.

- **Oral presentation**

A vendor who submits a proposal in response to the RFP may, at the discretion of Brunswick County Schools, be required to give an oral presentation and/or clarification of his/her proposal to Brunswick County Schools. This will provide an opportunity for the vendor to clarify or elaborate on his/her proposal but will in no way change the vendor's original proposal. The cost of preparing for and attending the meeting will be at the vendor's expense. Brunswick County Schools will schedule the time and location of each such presentation Brunswick County Schools determines that an oral presentation is necessary

- **Offeror Response**

Vendor shall review the Requirements and Specifications below and describe their proposed approach or ability to meet or exceed each specification or confirm and agree that they shall meet the specification. Vendor's responses shall be complete and comprehensive with a corresponding emphasis on being concise and clear. Vendor may include additional materials in a separate appendix in their offer and reference these additional materials in the applicable response below.

- **Proposal Evaluation**

All proposals will be evaluated by representatives of Brunswick County Schools. Brunswick County Schools may, at its sole discretion, ask for additional information and/or elect to conduct interviews with finalists to clarify information provided in the proposals.

SCOPE OF WORK & SCHEDULE

The contractor is responsible for all items required to complete the scope of services, those items being included in the scope of services even if not listed below.

Brunswick County Schools is seeking an attorney or firm to serve in the capacity of School Board Attorney. The district is seeking an attorney or firm well versed in education law, particularly federal and state statutory and case law governing public education, civil service, human resources, and general municipal matters in North Carolina. Additionally, the attorney or firm should be able to provide a broad range of legal services and prepare legal documents required by the Board and the Superintendent in the day-to-day operations of Brunswick County Schools.

Interested candidates must:

- Hold a Juris Doctorate degree;
- Be licensed in North Carolina;
- Possess excellent communication skills, both verbal and written;
- Be experienced in litigation and governmental practices, particularly those related to public education;
- Have reliable transportation to facilitate participation in face-to-face meetings;
- Work effectively with the internal staff including the Board of Education, the Superintendent, the Leadership Teams, and other Central Services staff and school staff on an ongoing basis; and,
- Work effectively with external constituents including judges, other attorneys, the Clerk of Courts, law enforcement, community agencies, advocates, and families.

The following services will be expected:

- Attend all Board business meetings and assist in maintaining Closed Session minutes (it is preferred that attending attorney have a minimum of two (2) years of experience in the representation of the Board of Education and/or work in education cases, and a working knowledge of Robert's Rules);
- Attend all Board work sessions and special called meetings, including Closed Sessions of the Board (it is preferred that attending attorney have a minimum of two (2) years of experience in the representation of the Board of Education and/or work in education cases, and a working knowledge of Robert's Rules);
- Attend all Policy Committee meetings (attending attorney must have a minimum of two (2) years of experience in the representation of the Board of Education and/or work in education cases, and a working knowledge of Robert's Rules);
- Provide advice and consultation about Open Meetings Law and Freedom of Information Law;
- Consult as needed with the Board and Board Chairperson, as well as the Superintendent/designee about legal matters;
- Represent and negotiate on behalf of the Board in legal matters;
- Review all potential Board decisions and contractual agreements and make recommendations to the Board;
- Be available upon short notice to handle time-sensitive matters;
- Provide training (at least annually) to the Board of Education on procedural guidelines to conduct Board business, and admonish and advise the Board when potential procedural violations appear imminent; and,
- At all times serve as an advocate for the Board of Education.

The selected attorney or firm will:

- Be evaluated by the Board of Education; and,
- Train members of the Board of Education and Brunswick County Schools staff in relevant legal matters.

SCHEDULE:

Anticipated Project Start Date: Within 30 days of awarding of contract.

ALLOWANCE:

Allowances will be used for Owner requested and authorized, out-of-scope work. The contractor will invoice allowance amounts as a separate line item.

SUBMITTALS :

All shop drawings and product data associated with this work.

RFP FORMAT

The response, at a minimum, shall include the following information labeled as indicated:

A. Respondent's Profile and Submittal Letter – (10 points max)

RFP Submittal Letter signed by authorized agent of the business/corporation with proof of authorization from business. A brief profile of the firm, including:

1. Business History (Limited to one page)
2. Organizational Chart
3. Documentation from the appropriate state's agency confirming firm's legal entity type (i.e. sole proprietorship, partnership, limited liability partnership, corporation, Limited Liability Corporation, etc.).
4. Federal Identification Number of firm.
5. Ownership interests
6. Current Client List
7. Active business venues (counties, states, etc.)
8. Present status and projected direction of business

B. Project Management, Approach, Methodology and Timelines (20 points max)

Describe the Firm's understanding of the District's needs and the objectives to be accomplished. Refer to the Scope of Services of this Request for Proposal. Describe the Scope of Services proposed for the project, including the firm's overall approach to address the tasks assigned. Suggested deviations from the tasks or schedule may be proposed but shall be clearly identified as such and explained.

C. Experience of Key Personnel – (25 points max)

Provide a list of staff who will be assigned to the District's account. Include a resume for each listed individual, with a description of their qualifications and nature of their previous assignments.

D. References – (20 points max)

Provide a minimum of three (3) recent and relevant reference letters from Respondent's clients where the proposed services have been used within the past three (3) years. Reference letters should include a general description of the work performed. The degree of relevant experience

exhibited in the letters from the clients as it relates to North Carolina School Districts and/or political subdivisions will be a primary factor.

E. Fee Structure (20 points max)

1. Include a proposed fixed fee for services based on the submitted sample work plan and proposal. List the hourly rates and the title of the professional that could be associated with the requested services.
2. Provide estimates of other costs or charges, exclusive of fixed fee. If no additional costs are specifically detailed, the District will consider the basic fees as the only proposed and contractual fee schedule.

F. Other Services – (5 points max)

Services relevant to this contract that are in addition to the duties as outlined in the Scope of Services can be submitted in this section. Include any/all exceptions taken to the content of the Solicitation.

G. FORMS – (Non-Scored)

Respondent shall complete and execute the forms located in this RFP, as well as copies of all insurance and occupational licenses and shall include them in this section.

H. TO BE SUBMITTED IN A SEPARATE SEALED ENVELOPE - Financial Statement – (Non-Scored)

All respondents shall supply a financial statement, preferably a certified audit of the last available fiscal year. A third party prepared financial statement and the latest Dunn & Bradstreet report will be accepted.

Form 1 — Execution of Proposal

Legal Services

The person executing the Proposal, on behalf of the Company, being duly sworn, solemnly swears (or affirms) that neither he, nor any official, agent or employee of the Company has entered into any agreement, participated in any collusion, or otherwise taken any action which is in restraint of full and open competition in connection with any proposal or contract, that the Company has not been convicted of violating North Carolina General Statute 133-24 within the last three years, and that the Company intends to do the work with its own bona fide employees or subcontractors and is not proposing for the benefit of another company.

Submission of a response to this RFP constitutes certification that the Company and all proposed team members are not currently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this Project by any State or Federal department or agency. Submission is also agreement that Brunswick County Schools will be notified of any change in this status.

NC General Statute 133-32 and Brunswick County Schools (BCS) prohibit any gift from anyone with a contract with BCS, or from any person seeking to do business with BCS. By execution of this Proposal, you attest, for your organization and its employees or agents, that you are not aware that any such gift has been offered, accepted, or promised by any employees of your organization.

Offer valid for 60 days from date of proposal opening unless otherwise stated here: days.

The information contained in this Proposal, including its forms and other documents, delivered or to be delivered to BCS, is true, accurate, and complete. This Proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead BCS as to any facts.

Company Legal Name: _____

Mailing Address: _____

City/State/Zip: _____

Phone/Email: _____

Printed Name/Title: _____

Signature: _____

Type of Company: Sole Proprietor

(check 1 box) Partnership

Corporation (identify the State of incorporation)

 Limited Liability Company (identify the State of incorporation)