REQUEST FOR PROPOSALS

SEATED BID NO: RFP15-034-MT

TITLE: Disparity Study Services

DESCRIPTION: The purpose of this Request for Proposals (“RFP”) is to select qualified and experienced individuals and/or organizations for the development and implementation of Disparity Study Services for Miami-Dade County Public Schools.

TERMS: One (1) years (Initial Term) with one (1) one-year Options-to-Renew

RFP RELEASE DATE: Friday, December 11, 2015

PRE-PROPOSAL CONFERENCE DATE/TIME: Wednesday, January 6, 2016 at 10 a.m. EST

PRE-BID CONFERENCE LOCATION: Miami-Dade County Public Schools
School Board Administration Building
Procurement Management Services
1450 Northeast 2nd Avenue, Suite 650
Miami, Florida 33132

DEADLINE FOR QUESTIONS: Wednesday, January 6, 2016 at 5 p.m. EST

PROPOSAL DUE DATE/TIME: Thursday, January 28, 2016 at 2 p.m. EST

PUBLIC OPENING OF BIDS: Thursday, January 28, 2016 at 2 p.m. EST

BID OPENING LOCATION: Miami-Dade County Public Schools
School Board Administration Building
Procurement Management Services
1450 Northeast 2nd Avenue, Suite 650
Miami, Florida 33132

FOR INFORMATION CONTACT: Melody Thelwell, MPA
Chief Procurement Officer
Phone: (305) 995-1434
Fax: (305) 995-2445
Email: mthelwell@dadeschools.net

Visit our web site at www.procurement.dadeschools.net to download a vendor registration package. The website also displays Bids, RFPs, bid opening, scheduled Selection Committee Meetings, award recommendations, and the current Board approved Procurement/Purchasing Regulations.
TABLE OF CONTENTS

Section

1.0 Overview and Proposal Procedures .................................................. 4
2.0 Scope of Services .............................................................................. 21
3.0 Price Proposal .................................................................................. 33
4.0 Proposal Format ................................................................................ 34
5.0 Evaluation/Selection Process .............................................................. 37
6.0 Proposed Agreement to be Executed with Awarded Proposer ............ 40
7.0 Attachments ....................................................................................... 48

Exhibit 1 Cover Page for Proposal
Exhibit 2 Affidavit Identifying Authorized Representative(s) for Selection Committee Proceedings (RFP Process)
Exhibit 3 Acknowledgment of Amendments
Exhibit 4 Local Business Affidavit of Eligibility
Exhibit 5 Florida Statutes on Public Entity Crimes
Exhibit 6 Vendor Experience
Exhibit 7 Anti-Collusion Statement
Exhibit 8 Disclosure of Employment of Former School Board Employees
DEFINITIONS

The following words and expressions used in this solicitation shall be construed as follows, except when it is clear from the context that another meaning is intended:

a) “Board Policy” means any and all policies adopted by the School Board and in effect at the time the RFP is published and as they may be amended from time to time (“Board Policy”). All Board Policies are incorporated by reference into this Solicitation and into all Proposals submitted by a Proposer.

b) “Chief Procurement Officer” means the individual who serves as the principal public purchasing official for the District.

c) “Contractor” means a person, firm, entity or organization who contracts to furnish supplies or perform work at a certain price or rate.

d) “Department” means the division within the District that is requesting the services or product throughout this request for proposal.

e) “Proposer”, “Submitter,” “Offerer” or “Respondent” means the person, firm, entity or organization submitting a response to this Solicitation.

f) “Selection Committee” means a committee of individual(s) who evaluate and rank proposals; conduct negotiations; and makes a contract award recommendation to the District and its respective Committees.

g) “Scope of Services” or “Scope of Work” means the work to be performed by the Proposer or Consultant as described in Section 2.0 of this RFP, as amended thereto.

h) “Solicitation” means this Request For Proposals (RFP) or Request For Qualifications (RFQ) or Request For Information (RFI) document, and all associated amendments and attachments.

i) “Subcontractor,” “Sub-Proposer” or “Sub-consultant” means any person, firm, entity or organization, other than the employees of the Contractor, who contracts with the Contractor to furnish labor, or labor and materials, in connection with the Work or Services to the District, whether directly or indirectly, on behalf of the Proposer.

j) “Superintendent”, “Superintendent of Schools” means the Secretary and executive officer of the district school board.

k) “The School Board of Miami-Dade County, Florida (“School Board”), means the governing body of elected officials comprising the district school board and who review and have the authority to approve or reject any and all recommendations for contract awards. “Miami-Dade County Public Schools”, “M-DCPS”, “The School Board of Miami-Dade County, Florida” or “District” are interchangeable terms.

l) “Work”, “Services”, “Program”, “Project” or “Engagement” means all matters and things that will be required to be done by the Contractor in accordance with the Scope of Services in Section 2.0 and the terms and conditions of this Solicitation.
1.1 INTRODUCTION/BACKGROUND

Miami-Dade County Public Schools (“M-DCPS”) is the fourth largest school district in the United States, comprised of approximately 392 schools, 345,000 students and over 40,000 employees. Located at the southern end of the Florida peninsula, the school district stretches over 2,000 square miles of diverse and vibrant communities ranging from rural and suburban to urban cities and municipalities. A truly global community, district students speak 56 different languages and represent 160 countries.

The Vision, Mission and Core Values of the M-DCPS are as follows:

VISION
We provide a world class education for every student.

MISSION
To be the preeminent provider of the highest quality education that empowers all students to be productive lifelong learners and responsible global citizens.

CORE VALUES

Excellence
We pursue the highest standards in academic achievement and organizational performance.

Equity
We foster an environment that serves all students and aspires to eliminate the achievement gap.

Student Focus
We singularly focus on meeting our students’ needs and supporting them in fulfilling their potential.

Innovation
We encourage creativity and adaptability to new ideas and methods that will support and improve student learning.

Accountability
We accept responsibility for our successes and challenges and seek to transparently share our work on an ethical manner, as we strive towards continuous improvement.

1.2 SUMMARY OF MAJOR GOAL, OBJECTIVES AND NEEDS

M-DCPS is seeking proposals from qualified firms and/or individuals for the development and implementation of Disparity Study Services for Miami-Dade County Public Schools.

The selected Proposer(s) will be awarded a one (1) year agreement, with one (1) one-year option to renew at the District’s sole discretion.
1.3 RFP TIMETABLE

The anticipated schedule for this RFP and contract approval is as follows:

RFP available for distribution: Friday, December 11, 2015

Pre-Proposal Conference date, time and place: Wednesday, Jan. 6, 2016 at 10 a.m. EST
Miami-Dade County Public Schools
School Board Administration Building
Procurement Management Services
1450 Northeast 2nd Avenue, Suite 650
Miami, Florida 33132

Deadline for receipt of questions: Wednesday, Jan. 6, 2016 at 5 p.m. EST
Emailed to Procurement Staff
(See Section 1.4)

Deadline for receipt of proposals: Thursday, January 28, 2016
No later than 2 p.m. (local time)
(See Section 1.9 for location)

Selection Committee Meetings: To Be Determined and Published via
Procurement Management Services’ website

Projected Board Approval of Contract: April 2016
Projected contract start date: April 2016

1.4 CONTACT PERSON

The contact person for this RFP is:

Name and Title: Melody Thelwell, MPA
Chief Procurement Officer

Mailing Address: Miami-Dade County Public Schools
School Board Administration Building
Procurement Management Services
1450 Northeast 2nd Avenue, Suite 650
Miami, Florida 33132

E-mail Address: mthelwell@dadeschools.net
Telephone: (305) 995-1434
Fax: (305) 995-2445
Explanation(s) desired by Proposer(s) regarding the meaning or interpretation of this RFP must be requested from the contact person, in writing, as is further described below.

Proposers are advised that from the date of release of this RFP until recommendations for award are published to the School Board or one of its committees, **NO verbal contact with District personnel related to this RFP is permitted**, except as authorized pursuant to the Cone of Silence provision herein at **Section 1.5**. Any such unauthorized contact shall not be used as a basis for responding to this RFP and also may result in the disqualification of the Proposer's submittal.

### 1.5 CONE OF SILENCE

As stated within School Board Rule Policy 6325, “Cone of Silence” means a prohibition on any communication regarding a particular Request For Proposals (RFP), bid, or other competitive solicitation between:

1. any person who seeks an award there from, including a potential vendor or vendor's representative; and
2. any School Board member or the member’s staff, the Superintendent, Deputy Superintendents and their respective support staff, or any person appointed by the School Board to evaluate or recommend selection in such procurement process. For purpose of this section, “vendor’s representative” means an employee, partner, director, or officer of a potential vendor or consultant, lobbyist, or actual or potential subcontractor or sub-consultant of a vendor, or any other individual acting through or on behalf of any person seeking an award.

A Cone of Silence shall be applicable to each RFP, bid, or other competitive solicitation during the solicitation and review of bid proposals. At the time of issuance of the solicitation, the Superintendent or the Superintendent’s designee shall provide public notice of the Cone of Silence. The Superintendent shall include any advertisement and public solicitation for goods and services in a statement disclosing the requirements of this section.

The Cone of Silence shall terminate at the time the Superintendent of Schools submits a written recommendation to award or approve a contract, to reject all bids or responses, or otherwise takes action which ends the solicitation and review process. All provisions of the above-referenced School Board Rule Policy 6325 apply to this solicitation.

### 1.6 LOBBYING

School Board Policy 8150, LOBBYISTS – states, in part, that The School Board of Miami-Dade County, Florida, has determined and declared that the operation of responsible government requires that the fullest opportunity be afforded to the people to petition the School Board and the Miami-Dade County Public Schools District to express freely their opinions on School Board actions and issues; and that to preserve and maintain the integrity of the governmental decision-making process, it is necessary that the identity, expenditures, fees, and activities of certain persons who engage in efforts to influence actions of School Board members and employees either by direct or indirect communication be publicly and regularly disclosed.
Lobbyist means any individual, firm, or corporation compensated by or who contracts for economic consideration from any principal person or organization for the purpose of lobbying. Lobbying means any oral or written communication, direct or indirect with the School Board, members of the School Board, School Board Committees, School Board Administrative Assistants, School Board Attorneys, or members of the Miami-Dade County Public Schools administrative staff, for the purpose of influencing any action, non-action or decision, or attempting to obtain the good will of a School Board member or employee of the school district. Pursuant to this rule, lobbyists shall complete annually, a Lobbyist Registration Form, and pay the annual registration fee. Furthermore, every person required to register shall list all individuals who may make a presentation when the person appears as a representative for an individual or firm for an oral presentation before a site administrator, or instructional personnel, or certification, evaluation, selection, technical review or similar oral presentation committee. This listing shall include the Clerk’s form, the list of presenters, and the indication of fee receipt, prior to the oral presentation. No person shall appear before any employee or committee on behalf of any individual or firm unless he or she has been listed as part of the firm’s presentation team or unless he or she is registered with the Clerk’s office and has paid all applicable fees.

The Board policy may be accessed at: http://www2.dadeschools.net/schoolboard/rules/

1.7 RFP AVAILABILITY

The solicitation package is available through the District’s Procurement Management Department. Please email your request to Melody Thelwell, Chief Procurement Officer, at mthelwell@dadeschools.net. Proposers or Respondents who obtain copies of this Solicitation from sources other than the District’s Procurement Management Department risk the potential of not receiving amendments, since their names will not be included on the list of firms participating in the process for this particular Solicitation. Such Proposers or Respondents are solely responsible for those risks.

1.8 TERM AND RENEWAL

The term of the resulting agreement shall be for a period of one (1) year, with one (1) option to renew, all at the sole discretion of the District. The option to renew will be evidenced in writing as a contract amendment to the resulting agreement, negotiated, executed and signed by the District prior to the expiration date of the resulting agreement or any valid extension thereof. The District, in its sole discretion, may negotiate a different contract term (fixed term and option periods) from the term advertised in this RFP in the best interests of the District.

1.9 PROPOSAL SUBMISSION

The entire proposal packets, including all originals and copies, must be submitted in a main sealed envelope or container (box). Proposals must be submitted in the following format:

- **One** (1) unbound **original proposal** with all attachments and original signatures.
- **Eight** (8) bound copies of the **original proposal**.
- **Eight** (8) **electronic versions on CD or USB Drive in Microsoft Word, Excel or PDF format**.
All proposals must be submitted on 8 1/2” X 11” paper, neatly typed on one side only, with normal margins and spacing. Proposals must be received by the deadline for receipt of proposal specified in this RFP Timetable. The original and all copies must be submitted in a sealed envelope or container clearly labeled on the outside with the Proposer’s name, address, telephone number, the RFP number, RFP title, and Proposal Due Date to:

Miami-Dade County Public Schools  
School Board Administration Building  
Procurement Management Services  
Attn: Melody Thelwell, MPA  
1450 N.E. 2nd Avenue, Suite 650  
Miami, FL 33132

Hand-carried proposals may be delivered to the above address ONLY between the hours of 9 a.m. and 4 p.m.; Mondays through Fridays (however, please note that proposals are due at the District on the date and at the time indicated in Section 1.3. Additionally, M-DCPS is closed on holidays observed by the District. Proposers are responsible for informing any commercial delivery service, if used, of all delivery requirements and for ensuring that the required address information appears on the outer wrapper or envelope used by such service. Proposal response submission to the Procurement Management Services on or before the stated time and date will be solely and strictly the Proposer’s responsibility. M-DCPS will not in any way be responsible for delays caused by the United States mail delivery system or by any other occurrence.

Proposals must be signed by an authorized officer of the Proposer who is legally authorized to enter into a contractual relationship in the name of the Proposer. The submittal of a proposal by a Proposer will be considered by the District as constituting an offer by the Proposer to perform the required services at the stated prices.

1.10 PRE-PROPOSAL CONFERENCE

A pre-proposal conference has been scheduled for the date, time, and place specified in this RFP Timetable (see Section 1.3). Attendance is highly recommended but not mandatory. Please note, bidders may ask questions, however, all questions MUST be submitted in writing by the due date stated in Section 1.3.

1.11 ADDITIONAL INFORMATION / AMENDMENT

Requests for additional information or clarifications must be made in writing and received by the Buyer for this RFP, in accordance with Section 1.4 above, no later than the deadline for receipt of questions specified in the RFP Timetable (see Section 1.3). The request must contain the RFP number and title, Proposer’s name, name of Proposer’s contact person, address, phone number, email and facsimile number.

Email requests for additional information will be received by the Buyer at the email address specified in Section 1.4 above. Emails should have at a minimum, the Proposer’s name, name of Proposer’s contact person, address, phone number, facsimile number, and RFP number and title. A copy of any written communication or email must be sent to the Executive Assistant to the Clerk of the School Board as fully described at Section 1.5 above.

Page 8 of 58
The District will issue responses to inquiries and any other corrections or changes it deems necessary by way of written solicitation amendments issued prior to the Proposal Due Date. Proposers should not rely on any representations, statements or explanations other than those made in this RFP or in any written amendments to this RFP. Where there appears to be conflict between the RFP and any amendments, the last amendment issued shall prevail.

It is the Proposer’s responsibility to assure receipt of all amendments. The Proposer should verify with the designated Buyer prior to submitting a proposal that all amendments have been received. Proposers are required to acknowledge the number of amendments received as part of their proposals (see attached Exhibit 3).

Proposers who obtain copies of this RFP from sources other than the District’s Department of Procurement Services risk the potential of not receiving amendments since their names will not have been included on the Proposer List for this particular RFP. Such Proposers are solely responsible for those risks.

1.12 PROPOSAL GUARANTEE DEPOSIT

No Proposal Guarantee Deposit will be required for this RFP.

1.13 PERFORMANCE OR PAYMENT BONDS

No Performance or Payment Bonds will be required for this RFP.

1.14 SMALL BUSINESS ENTERPRISE PROGRAM

The School Board of Miami-Dade County, Florida, has a strong commitment to SBE participation as part of all related procurement processes and continues to reflect such commitment. The School Board has an active Small Business Enterprise (SBE) Certification Program, to increase contracting opportunities for SBE’s. Pursuant to Board Policy 6320.02, the Board may apply scoring incentives and/or other incentives for SBE/MBE firms responding to this RFP. The Office of Economic Opportunity must certify all SBE’s, prior to contract award. The application may be accessed through the following link:

http://forms.dadeschools.net/webpdf/3920.pdf

Vendors certified as an SBE with any entity or agency other than The School Board of Miami-Dade County, Florida, may not be acceptable. Proposers will certifications from other entities or agencies must contact our OEO office for additional information. A current list of certified SBE/MBEs can be found online at www.oeo.dadeschools.net or by contacting the Office of Economic Opportunity at (305)-995-1307.

1.15 LOCAL PREFERENCE

The School Board of Miami-Dade County, Florida, adopted School Board Policy 6320.05, which gives local preference to businesses located in Miami-Dade County, Florida, when evaluating the lowest responsible, responsive bid or submittal for the purchase of goods and services, professional and construction-related services, in excess of $50,000 or the current formal bidding threshold set by Statute. The preference does not apply to goods or services exempted by statute as reflected in Policy 6320, or prohibited by Federal or State law, or other funding
source restrictions.

Definition:

Local business means the vendor has a valid business license, issued by a jurisdiction located in Miami-Dade County, with its headquarters, manufacturing facility, or locally-owned franchise located within the legal boundaries of Miami-Dade County, for at least twelve (12) months (or having a street address for at least twenty-four (24) months), prior to the bid or proposal opening date. Post office boxes are not verifiable and shall not be used for the purpose of establishing said physical address. In order to be considered for local preference, vendors must provide a copy of their business license and the local business affidavit of eligibility with their bid or proposal. A vendor who misrepresents the local preference status of its firm in a proposal or bid submitted to the School Board will lose the privilege to claim local preference status, and shall lose eligibility to claim local preference status for a period of one (1) year. The Superintendent may also recommend that the firm be referred for debarment in accordance with Policy 6320.04.

PROCESS:

Request For Proposals:

If following the completion of initial evaluations, a local firm has submitted a proposal and is competing with a non-local proposer(s), then the local vendor(s) shall have the opportunity to proceed to be considered for further evaluation provided the price is within five percent (5%) of the cost proposed by the non-local vendor, all other technical requirements being equal. In the case of a tie in the best and final proposal between a local business, the tie shall be broken as delineated in Policy 6320.

Proposers claiming local vendor preference must submit a Local Business Affidavit of Eligibility (Exhibit 4) and a copy of its business license with its response.

The Board policy may be accessed at: http://www2.dadeschools.net/schoolboard/rules/

1.16 INCOMPLETE OR MISSING DOCUMENTS FOR THIS SOLICITATION

All proposals received in response to this RFP, will be sealed for a period of 20 days, pursuant to Florida Statute 119.07, to allow for the request and receipt of any missing documents.

Respondents who do not meet all the requirements for the RFP may be contacted to submit the missing information within 2 business days. If the District requests missing documentation and does not receive the documents within the stated deadline, incomplete or noncompliant proposals may be disqualified.

1.17 LATE PROPOSALS, LATE MODIFICATIONS AND LATE WITHDRAWALS

No late proposal, bid, modification, or late withdrawal will be considered.
1.18 RFP POSTPONEMENT/CANCELLATION

The District may, at its sole and absolute discretion, reject any and all, or parts of any and all proposals; re-advertise this RFP; postpone or cancel, at any time, this RFP process; or waive any irregularities in this RFP or in the proposals received as a result of this RFP.

When a solicitation is canceled, notice of cancelation shall be posted on the District’s website and sent to all proposers solicited.

1.19 COSTS INCURRED BY PROPOSERS

All expenses involved with the preparation and submission of proposals to the District, or any work performed in connection therewith, shall be borne by the Proposer(s). No payment will be made for any responses received, or for any other effort required of or submitted by the Proposer prior to commencement of work as defined by a contract executed by M-DCPS.

1.20 COMPLIANCE WITH LAWS, ORDINANCES, CODES AND RULES/REGULATIONS

Proposers shall certify their ongoing compliance with the School Board Policies. Furthermore, Proposers must be familiar with and must be in compliance with all Federal, State and local laws, ordinances, codes, resolutions and implementing rules and regulations that may in any way affect the products or services offered. In the event of a conflict between this RFP and these legal requirements, the legal requirements shall prevail.

(a) Proposer must complete, sign as required and submit the following documents at the time of RFP submission due date. Also see Section 4.1.

| Exhibit 1 | Cover Page for Proposal |
| Exhibit 2 | Affidavit Identifying Authorized Representative(s) for Selection Committee Proceedings (RFP Process) |
| Exhibit 3 | Acknowledgment of Amendments |
| Exhibit 4 | Local Business Affidavit of Eligibility |
| Exhibit 5 | Florida Statutes on Public Entity Crimes |
| Exhibit 6 | Vendor Experience |
| Exhibit 7 | Anti-Collusion Statement |
| Exhibit 8 | Disclosure of employment of Former School Board Employees |

By completing and submitting said documents, the Proposer affirms continued compliance with the provisions of the District and School Board policies and procedures, as may be amended.

1.21 AFFIDAVIT IDENTIFYING AUTHORIZED REPRESENTATIVE(S)

Proposers are advised that the attached Affidavit of Identifying Authorized Representative for Selection Committee Proceedings (RFP Process) (see Section 7 Exhibit 2) must be completed, notarized and included with the proposal submission.

Any person who appears as a representative for an individual or firm for oral presentations before a M-DCPS selection or similar committee must be listed on this Affidavit. Persons listed on the affidavit are not required to pay any lobbying registration fees. Additional authorized
representatives for Oral Presentations including negotiations under this RFP process shall be recognized upon submission, prior to oral presentation, to the M-DCPS Buyer of another fully executed affidavit (Exhibit 2). Any person not listed on the affidavit shall be excluded from participation in oral presentations, unless he or she is registered with the Clerk of the Board and has paid all applicable fees as a registered lobbyist.

NOTE: Other than for oral presentations under this RFP process, Proposers who wish to address any M-DCPS School Board member or an M-DCPS committee or subcommittee concerning any actions, decisions or recommendations of M-DCPS personnel must register with the Clerk of the School Board and pay all applicable fees as a registered lobbyist under School Board Policy 8150.

1.22 FLORIDA STATUTES ON PUBLIC ENTITY CRIMES

Pursuant to Paragraph 2(a) of Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted Proposer/Vendor list following a conviction for a public entity crime may not submit a proposal for a contract to provide any goods or services to a public entity; may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work; may not submit proposals on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and, may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for CATEGORY TWO ($10,000) for a period of thirty-six (36) months from the date of being placed on the convicted Proposer list. Attached is a Public Entity Crime Disclosure Affidavit (Exhibit 5) that must be completed and notarized prior to award unless an Affidavit of Continued Compliance is applicable and is appropriately executed.

1.23 PROPRIETARY/CONFIDENTIAL INFORMATION

Proposers are hereby notified that all information submitted as part of, or in support of, proposals would be available for public inspection after opening of proposals, in compliance with Chapter 119, Florida Statutes, popularly known as the "Public Record Law."

The Proposer shall not submit any information in response to this solicitation, which the Proposer considers to be a trade secret, proprietary or confidential. The submission of any information to the District in connection with this solicitation shall be deemed conclusively to be a waiver of any trade secret or other protection, which would otherwise be available to Proposer. In the event that the Proposer submits information to the District in violation of this restriction, either inadvertently or intentionally, and clearly identifies that information in the proposal as protected or confidential, the District shall endeavor to redact and return that information to the Proposer as quickly as possible, and if appropriate, evaluate the balance of the proposal. The redaction or return of information pursuant to this clause may render a proposal not eligible for consideration. Alternatively, the Proposer may choose in writing to waive any claim to confidentiality promptly upon written notice from the District.
1.24 EVALUATION/SELECTION PROCESS

Please see Section 5.0 of this document for the Evaluation/Selection process that shall govern this RFP.

1.25 PROTEST TO CONTRACT SOLICITATION OR AWARD

The Board shall provide notice of a decision or intended decision concerning a solicitation, contract award, or exceptional purchase by electronic posting which can be accessed at the District’s website www.dadeschools.net

Any person who is adversely affected by the agency decision or intended decision, shall file with the agency a notice of protest in writing within 72 hours after the posting of the notice of decision or intended decision. With respect to a protest of the terms, conditions, and specifications contained in a solicitation, including any provisions governing the methods of ranking proposals or replies, awarding contracts, reserving rights of further negotiation or modifying or amending any contract, the notice of protest shall be filed in writing within 72 hours after the posting of the solicitation. The formal written protest shall be filed within 10 days after the date of the notice of protest is filed. The formal written protest shall state with particularity the facts and law upon which the protest is based. Saturdays, Sundays, and state holidays shall be excluded in the computation of the 72-hour time periods established herein.

The protesting party shall be required to post a bond consistent with F.A.C. Rule 28-110.005(2), and Board Policy 6320. Failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes, or failure to post the bond or other security required by law within the time allowed for filing bond shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.

Formal written protests will be reviewed by Procurement Management Services who will offer the protesting proposer the opportunity to meet and discuss the merits of the protest. If the protest is not resolved, the Proposer may seek an administrative hearing pursuant to 120.57 Florida Statutes. Petitions for hearings on protests pursuant to 120.57 Florida Statutes must be filed in accordance with School Board Policies 6320 and 0133.

The “Notice of and/or formal written Protest” shall be filed with:

The Office of the School Board Clerk
Miami-Dade County Public Schools
1450 Northeast Second Avenue, Room 268B
Miami, Florida 33132
Fax: (305) 995-1448
E-Mail: Martinez@dadeschools.net

1.26 NOTICE OF AWARDS

The Board reserves the right to reject any and all proposals, to waive irregularities or technicalities, and to request re-bids. The Board reserves the right to utilize other governmental contracts, if in the best interest of the Board.

Notices will be posted on the District’s website no later than the Friday preceding a regularly
scheduled Board meeting.

Awards become official upon the Board’s formal approval of the award.

1.27 DEFAULT

In the event of default, which may include, but is not limited to non-performance and/or poor performance, the Proposer shall lose eligibility to transact new business with the Board for a period of 14 months from date of termination of award by the Board. Proposers that are determined ineligible may request a hearing pursuant to §120.569, Fla. Statute, and School Board Policy 6320. The School Board reserves the right to reject any and all bids from a Vendor who is currently debarred or in default of any bid, purchase order or contract with the School Board or any other private or governmental entity, pursuant to School Board Policy 6320.

1.28 COMPLIANCE WITH STATE/FEDERAL REGULATIONS

All contracts involving federal funds will contain certain provisions required by applicable sections of CFR 34, Part 80.36(l) and Part 85.510, Florida Statute 257.36, or Florida Administrative Code Chapter 1B. The vendor certifies by signing the proposal that the vendor and his/her principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in federally funded transactions and may, in certain instances, be required to provide a separate written certification to this effect.

During the term of any contract with the Board, in the event of debarment, suspension, proposed debarment, declared ineligible or voluntarily excluded from participation in federally funded transactions, the vendor shall immediately notify Procurement Management Services, in writing. Vendors will also be required to provide access to records, which are directly pertinent to the contract and retain all required records for three years after the Board makes final payment.

For all contracts involving Federal funds in excess of $10,000, the Board reserves the right to terminate the contract for cause, as well as for convenience, by issuing a certified notice to the vendor.

CERTIFY REGISTRATION AND USE OF EMPLOYMENT STATUS VERIFICATION SYSTEM.

The Status Verification System, also referred to as “E-verify,” only applies to construction and professional services contracts using federal funds.

Each Offeror and each duly authorized person signing on behalf of any Offeror certifies as to its own entity, under penalty of perjury, that the named Offeror has registered and is participating in the Status Verification System to verify the work eligibility status of the contractor’s new employees who are employed in the State of Florida in accordance with Executive Order 13465.

The contractor shall require that the following provision be placed in each subcontract at every tier. “The subcontractor shall certify to the main (prime or general) contractor by affidavit that the subcontractor has verified through the Status Verification System the employment status of each new employee in the respective subcontractor, all in accordance with and to comply with all applicable employee verification laws. Such affidavit must be provided prior to the notice to proceed for the subcontractor to perform the work.” The Board will not consider a proposal for award, nor will it make any award where there has not been compliance with this Section. Manually or electronically signing the Proposal is deemed the Contractor’s certification of
compliance with all provisions of this employment status verification certification required by all applicable status verification laws.

1.29 BACKGROUND SCREENING REQUIREMENTS

In accordance with the requirements of Sections, 1012.465, 1012.32, and 1012.467, Florida Statutes, School Board Policies 6320 and 8475, as amended from time to time Proposer agrees that, if Proposer receives remuneration for services, Proposer and all of its employees who provide or may provide services under this Agreement will complete criminal history checks, and all background screening requirements, including level 2 screening requirements as outlined in the above-referenced Statutes and School Board policies prior to providing services to The School Board of Miami-Dade County, Florida.

Additionally, Proposer agrees that each of its employees, representatives, agents, subcontractors or suppliers who are permitted access on school grounds when students are present, who have direct contact with students or who have access to or control of school funds must meet level 2 screening requirements as described in the above-referenced Statutes and School Board policies.

Pursuant to the 2007 amendments to the JLA enacted by the Florida Legislature, requirements for certain fingerprinting and criminal history checks shall be inapplicable to non-instructional contracted personnel who qualify for exemption from level 2 screening requirements as provided under § 1012.468, Fla.Stat. (2007). In addition, the provisions of § 1012.467, Fla.Stat. (2007) are incorporated herein by reference, and any provisions of this Addendum that may be inconsistent with, contrary to, or determined to be in conflict with § 1012.467, will be superseded by said Statute.

A non-instructional contractor who is exempt from the screening requirements set forth in §1012.465, § 1012.468 or § 1012.467, Florida Statutes, is subject to a search of his or her name or other identifying information against the registration information regarding sexual predators and sexual offenders maintained by the Department of Law Enforcement under § 943.043 and the national sex offender public registry maintained by the United States Department of Justice. Proposer will not be charged for this search. Further, upon obtaining clearance by Board, if Board deems necessary, Board will issue a photo identification badge which shall be worn by the individual at all times while on Board property when students are present.

Proposer agrees to bear any and all costs associated with acquiring the required background screening - including any costs associated with fingerprinting and obtaining the required photo identification badge. Proposer agrees to require all its affected employees to sign a statement, as a condition of employment with Proposer in relation to performance under this Agreement, agreeing that the employee will abide by the heretofore described background screening requirements, and also agreeing that the employee will notify the Proposer/Employer of any arrest(s) or conviction(s) of any offense enumerated in School Board Policies 6320 and 8475 within 48 hours of its occurrence. Proposer agrees to provide the Board with a list of all of its employees who have completed background screening as required by the above-referenced statutes and who meet the statutory requirements contained therein. Proposer agrees that it has an ongoing duty to maintain and update these lists as new employees are hired and in the event that any previously screened employee fails to meet the statutory standards. Proposer further agrees to notify the Board immediately upon becoming aware that one of its employees who
was previously certified as completing the background check and meeting the statutory standards is subsequently arrested or convicted of any disqualifying offense. Failure by Proposer to notify the Board of such arrest or conviction within 48 hours of being put on notice and within 5 business days of the occurrence of qualifying arrest or conviction, shall constitute grounds for immediate termination of this Agreement by the Board.

The parties further agree that failure by Proposer to perform any of the duties described in this section shall constitute a material breach of the Agreement entitling the Board to terminate this Agreement immediately with no further responsibility to make payment or perform any other duties under this Agreement.

1.30 COMPLIANCE WITH SCHOOL CODE

Proposer agrees to comply with all sections of the Florida K-20 Education Code, Title XLVIII Florida Statutes as it presently exists, and further as it may be amended from time to time. Further Proposer agrees that failure to comply with the Florida K-20 Education Code shall constitute a material breach of this Agreement and may result in the termination of this Agreement by the Board.

1.31 CONFLICT OF INTEREST

Former Miami-Dade County Public Schools employees, classified as Managerial Exempt Personnel, Pay Grade 22 and above, Dade County School Administrators Association, Pay Grade 47 and above, and other equivalent positions, are prohibited from personally representing another person or entity or acting as an agent or attorney for compensation in connection with any matter in which The School Board of Miami-Dade County, Florida, is interested, for two years after the School Board employees’ service terminates. This provision is pursuant to School Board Policies 1129, 3129, 4129 and Florida Statute § 112.313(9).

The School Board of Miami-Dade County, Florida, shall be prohibited from entering into any business relationship or continue an existing business relationship with any person or entity determined to have engaged in violation of the restriction contained in this provision.

1.32 PUBLIC RECORDS LAW

It is the practice of The School Board of Miami-Dade County, Florida, to evaluate all Requests For Proposals in a public forum open to the Sunshine, pursuant to Florida Statute §286.011 and to make available for public inspection and copying any information received in response to an RFP, in accordance with Florida Statute §119, as such any information sent to M-DCPS is being sent into the public domain. No action on the part of the proposer would create an obligation of confidentiality on the part of the School Board, including but not limited to, making a reference in the proposal to the trade secret statutes, Florida Statutes §§ 812.081, 815.045. It is recommended that potential suppliers exclude from their response any information that, in their judgment, may be considered a trade secret.

1.33 ASSIGNMENT

This Contract may not be assigned nor may any assignment of monies due, or to become due to proposer, be assigned without the prior written agreement of Miami-Dade County Public Schools. If proposer attempts to make such an assignment, such attempt shall constitute a condition of default.
1.34 TERMINATION FOR CONVENIENCE

The School Board may terminate the Agreement at any time without cause upon a minimum thirty (30) days’ notice to Proposer, in which case the following provisions shall apply: (A) The notice may be effective as of a date certain or may apply only after the delivery of certain enumerated deliverables; (B) The School Board shall pay to Proposer upon receipt of an invoice from Proposer otherwise complying with the Agreement, for any services in respect of a deliverable not yet delivered which have actually been performed by Proposer, pro-rated on a percentage completion basis based on Proposer’s reconciliation of labor actually expended compared to labor originally estimated by Proposer in constructing its proposal.

1.35 DEBARMENT

Pursuant to Board Policy 6320, Contractor Debarment Procedures – Debarred contractors are excluded from conducting business with the Board as agents, representatives, partners, and associates of other contractors, subcontractors or individual sureties.

1.36 PURCHASES BY OTHER PUBLIC AGENCIES

With the consent and agreement of the successful Proposers(s), purchases may be made under this proposal by Miami-Dade County, Florida, and other governmental agencies or political subdivisions within the State of Florida. Such purchases shall be governed by the same terms and conditions stated herein. This agreement in no way restricts or interferes with the right of any State of Florida Agency or political subdivision to rebid any or all of these items.

1.37 NO GRATIUTY POLICY

It is the policy of Procurement Management Services not to accept gifts, gratuities, or favors of any kind or of any value whatsoever from vendors, members of their staffs, or families.

1.38 DAVIS-BACON ACT LABOR STANDARDS

This project may be funded in whole or in part under the provisions of the American Recovery and Reinvestment Act of 2009. Therefore, the Proposer shall comply with all applicable provisions of 40 U.S.C. §276a-§276a-7, the Davis-Bacon Act, as supplemented by the Department of Labor regulations (29 C.F.R., PART 5 “Labor Standards Provisions Applicable to Contracts Governing Federally Financed and Assisted Construction).

1.39 INDEMNIFICATION

To the fullest extent permitted by law, Proposer shall indemnify and hold harmless the Board, and its employees (“Indemnitees”) from and against all claims, liabilities, damages, losses, and costs including, but not limited to, reasonable costs and attorneys’ fees at the pre-trial, trial and appellate levels, arising out of, resulting from or incidental to Proposer’s performance under this Contract or to the extent caused by negligence, recklessness, or intentional wrongful conduct of Proposer or other persons employed or utilized by Proposer’s performance of this Contract. The remedy provided to the Indemnitees by this indemnification shall be in addition to and not in lieu of any other remedy available under the Contract or otherwise. This indemnification obligation shall not be diminished or limited in any way to any insurance maintained pursuant to the
Contract otherwise available to Proposer. The remedy provided to the Indemnitees by this indemnification shall survive this Contract. The provisions of this Section shall specifically survive the termination of this Contract. The provisions of this Section are intended to require Proposer to furnish the greatest amount of indemnification allowed under Florida law. To the extent any indemnification requirement contained in this Contract is deemed to be in violation of any law, that provision shall be deemed modified so that Proposer shall be required to furnish the greatest level of indemnification to the Indemnitees as was intended by the parties hereto.

1.40 DUTY TO DEFEND

Proposer agrees, at its own expense, and upon written request by the Board, to defend any suit, action or demand brought against the Board on any claim or demand arising out of, resulting from or incidental to Proposer’s performance under this Contract.

1.41 INSURANCE REQUIREMENTS

Prior to commencement of work under the agreement, the Proposer shall obtain and maintain without interruption the insurance as outlined below. The Proposer agrees to furnish a fully completed certificate of insurance naming the School Board of Miami-Dade County, Florida as additional insured, signed by an authorized representative of the insurer providing such insurance coverages. The insurance coverages and limits shall meet, at a minimum, the following requirements:

A. Workers’ Compensation/Employer’s Liability Insurance.

Such insurance shall be no more restrictive than that provided by the Standard Workers' Compensation Policy, as filed for use in Florida by the National Board on Compensation Insurance, without restrictive endorsements. The minimum amount of coverage (inclusive of any amount provided by an umbrella or excess policy) shall be:

Part One: "Statutory"
Part Two: $1,000,000 Each Accident
$1,000,000 Disease - Policy Limit
$1,000,000 Disease - Each Employee

B. General Liability Insurance

Such insurance shall be no more restrictive than that provided by the most recent version of standard Commercial General Liability Form (ISO Form CG 00 01) without any restrictive endorsements. The minimum limits (inclusive of amounts provided by an umbrella or excess policy) shall be:

$2,000,000 General Aggregate
$2,000,000 Products/Completed Operations Aggregate
$1,000,000 Personal and Advertising Injury
$1,000,000 Each Occurrence

Company shall name the Board as an additional insured on a form no more restrictive than the CG 20 10.
C. Automobile Liability Insurance

Such insurance shall be no more restrictive than that provided by Section II (Liability Coverage) of the most recent version of standard Business Auto Policy (ISO Form CA 00 01) without any restrictive endorsements, including coverage for liability contractually assumed, and shall cover all owned, non-owned, and hired autos used in connection with the performance of the Contract. The minimum limits (inclusive of any amounts provided by an umbrella or excess policy) shall be:

$ 1,000,000 Each Occurrence - Bodily Injury and Property

D. Professional Liability

Such insurance shall be on a form acceptable to the Board and shall cover Company for those sources of liability arising out of the rendering or failure to render professional services in the performance of the services required in the Agreement including any hold harmless and/or indemnification agreement. Coverage must either be on an occurrence basis; or, if on a claims-made basis, the coverage must respond to all claims reported within three years following the period for which coverage is required and which would have been covered had the coverage been on an occurrence basis. The minimum limits (inclusive of any amounts provided by an umbrella or excess policy) shall be:

$ 3,000,000 Each Claim/Annual Aggregate

The Professional Liability Insurance required under this Section D. may be subject to a deductible not to exceed $25,000 per claim.

E. Employee Dishonesty (Fidelity)

Such insurance shall be no more restrictive than that provided by the most recent version of standard Commercial Crime Coverage Form (ISO CR 00 21) without restrictive endorsements or on a form acceptable to the Board and shall cover Company and Board against loss caused by the dishonesty of employees of Company in connection with the Contract. Coverage will include Employee Theft, Forgery and Alteration, Computer Fraud, and Funds Transfer Fraud. The minimum limits shall be:

$10,000,000 Each Occurrence

The insurance provided by the Company shall apply on a primary basis. Any insurance, or self-insurance, maintained by the Board shall be excess of, and shall not contribute with, the insurance provided by the Company.

Compliance with these insurance requirements shall not limit the liability of the Company. Any remedy provided to the Board by the insurance provided by the Board shall be in addition to and not in lieu of any other remedy (including, but not limited to, as an indemnitee of the Company) available to the Board under this Contract or otherwise. Neither approval nor failure to disapprove insurance furnished by the Company shall relieve the Company from responsibility to provide insurance as required by this Contract.
M-DCPS and its members, officers, employees, and agent shall be named an additional insured on all liability coverages except Workers’ Compensation Insurance and Professional Liability Insurance.

1.42 TYPE OF BUSINESS ORGANIZATION AND AUTHORITY OF SIGNATORY

If a Proposal is submitted by a corporation, provide documentation that the corporation is active and authorized to do business in the State of Florida, and that its corporate status shall remain active and unchanged at the time of award of the contract. As to other types of business organizations, please provide any and all documentation relating thereto, including without limitation, verification that the party signing this Proposal is fully authorized and empowered to do so on behalf of the Proposer. In addition, set forth names (s) and titles of any and all parties who are authorized to contract on behalf of the Proposer.

1.43 CANCELLATION OF BIDS OR REQUESTS FOR PROPOSALS

A Bid or RFP may be canceled, in whole or in part, as may be specified in the solicitation, when it is in the best interest of the Board. When a solicitation is canceled prior to opening, a notice of the cancellation shall be posted on the District’s website. Any Bids or proposals received for the canceled solicitation shall be returned to the vendor unopened.

1.44 CHARTER SCHOOLS

Items or Services awarded under this contract shall be made available to Charter Schools approved by the School Board of Miami-Dade County Public Schools. M-DCPS is not responsible or liable for purchases that may be made by Charter Schools.

1.45 EQUAL EMPLOYMENT OPPORTUNITY AND M/WBE PARTICIPATION

It is the policy of the School Board that no person will be denied access, employment, training, or promotion on the basis of gender, race, color, religion, ethnic or national origin, political beliefs, marital status, age, sexual orientation, social and family background, linguistic preference or disability, and that merit principles will be followed.

Furthermore, all vendors must review, acknowledge, and comply with Board Policy 6465 Commercial Anti-Discrimination, Diversity, and Inclusion. The Contractor shall make every attempt to include the participation of M-DCPS Certified Small/Micro and/or Minority/Women-Owned Business Enterprises under the terms of this contract, as stated in Section 1.14 of this RFP.

1.46 POTENTIAL INTERNSHIP OPPORTUNITIES FOR M-DCPS STUDENTS WITH AWARDED VENDORS

The District has several initiatives to prepare and increase student participation in appropriate internship opportunities. The District's Office of Community Engagement facilitates the student internship program where organizations may participate as Business Mentors. For more information about how to be an internship provider, please visit http://www.engagemiamidade.net/#community-internships/c7pc or email us at internships@dadeschools.net. As an awarded vendor, District staff may contact your organization regarding current and upcoming Business Mentor opportunities for M-DCPS students and seek your organization's participation, if eligible.
SECTION 2.0 – SCOPE OF SERVICES

This section identifies the levels of performance that are desired by the District. Proposers are instructed to indicate a response to ALL service requirements and specifications contained in this Section in the order listed using the same numbering system.

The inability or denial expressed in a proposal, or omission in the proposal, to offer to comply/conform with the technical requirements of this Section of the Request for Proposal (RFP) may result in deductions in the allocation of points by the Selection Committee.

2.1 GENERAL INFORMATION

In the City of Richmond, Virginia, vs. J.A. Croson Co., 109 S. Ct. 706 (1989), the United States Supreme Court held that a local governmental entity could take action to rectify the effects of identified discrimination within a jurisdiction where there is a significant statistical disparity between the number of qualified minority businesses willing and able to perform particular services and the number of such businesses actually engaged by the locality or contractors to perform the particular services. Narrowly tailored racial preference programs can be established to address exclusionary patterns and practices where there is direct evidence of discrimination. Other federal cases also indicate the need for disparity studies to gauge the levels of past discrimination against various minority groups by providing specific facts of identifiable instances.

2.2 PURPOSE

The primary purpose of this disparity study is to determine whether there is evidence showing that ready, willing, and able M/WBEs are significantly underutilized in goods/supplies, services, and maintenance and maintenance-related services contracts issued by the School Board. For purposes of this study, “ready, willing and able M/WBEs” are defined in accordance with School Board Policy 6320.02, Small/Micro and Minority/Women-Owned Business Enterprise Programs.

2.3 BACKGROUND

In 1985 and 1990, the School Board determined through its own statistical analysis of current contracting expenditures and evaluation of economic and sociological studies, that a disparity existed in contract awards to Minority/Women-Owned Business Enterprises (M/WBE) and that the disparity was a result of past discriminatory practices. In order to comply with the Croson ruling that race conscious programs require direct evidence of past discrimination, the Board then commissioned a disparity study.

The 1990 study concluded that market area industry practices in construction, construction support services, professional services, and commodities and services were discriminatory toward M/WBEs and that the School District had been a passive participant in discrimination against M/WBEs. Based on the results of that study, the Board modified its existing Business Development and Assistance Program to establish incentives that would increase opportunities specifically for M/WBEs contracting with the Board. In an effort to eliminate disparities in the utilization of M/WBE firms, the Board also implemented several race and gender-neutral initiatives such as bond waivers, establishing insurance requirements that provided appropriate protection but did not discourage M/WBE firms from competing for contracts, enhancing technical assistance programs, and increasing outreach efforts to M/WBEs.
On November 21, 2012, the Board determined that a new disparity study would need to be conducted in order to continue its M/WBE program. The Board repealed its Business Development and Assistance Program Policy with the understanding that it would develop a new M/WBE Program if supported by the results of a newly commissioned disparity study. At the same time, the Board approved Policy 6320.02 which authorized the Small/Micro Business Enterprise (SMBE) Program to provide legally permissible race and gender-neutral participation by small and micro businesses in Board procurement of goods and services, construction, and professional services and to allow M/WBEs to participate in Board contracting as small and micro business enterprises while the study was being conducted. The program continued to certify M/WBEs, to include aspirational goals for M/WBEs in contracts and to track and monitor the utilization of M/WBEs through the SMBE Program.

In February 2013, the Board contracted with MGT of America, a Tallahassee consulting firm, to conduct Phase I of a Comprehensive Disparity Study (Phase 1 Disparity Study) to provide data regarding the Board’s design and construction related professional services procurement activity and race and gender-neutral remedial efforts for the study period between July 1, 2006, through June 30, 2012. The purpose of the Phase 1 Disparity Study was to specifically analyze the utilization of M/WBEs in the Board’s procurement of capital construction and design and construction related professional services. That study was accepted by the Board on November 19, 2014. In February 2015, the Board also commissioned Euquant, Inc., to provide further disparity analysis of the Board’s utilization of African-American subcontractors in construction (Subcontractor Disparity Study). The Subcontractor Disparity Study was accepted by the Board on September 9, 2015.

The Phase 1 Disparity Study and the subsequent Subcontractor Disparity Study reported findings that within the relevant geographic market of the Miami-Dade Metropolitan Statistical Area (Miami/Broward/Palm Beach) there are statistically significant disparities in the District’s utilization of ready, willing and able M/WBEs in the following categories of contracts and business owners (1) Prime Construction Contracts (African-American, Asian-American, Native-American and Non-Minority Women), (2) Construction Subcontracts (African-American, Asian-American and Native-American), (3) Prime Design and Construction-Related Professional Services (African-American, Asian-American, Native-American and Non Minority Women), (4) Design and Construction-Related Professional Services Subcontracts (African-American, Asian-American, Native-American and Non Minority Women). The Phase 1 Disparity also made other significant findings that are detailed in Policy 6320.02.

Based on these findings, the Board found that School Board and private sector disparities established an inference of discrimination that adversely affects the Board’s current utilization of ready, willing and able minority- and women-owned firms in its construction and construction-related procurement programs. And based upon the totality of the evidence gathered and presented to the Board since 1990, the Board amended policy 6320.02 to include race and gender-conscious programs addressing discrimination in the Board’s construction and construction-related procurement processes. The Board also expanded its anti-discrimination policies by amending Policy 6465, Commercial Anti-Discrimination in Business Operations and Practices, and adopting Policy 6320.06, Diversity, Equity, and Inclusion in Business Operations and Practices.
2.4 SCOPE OF SERVICES

The School Board seeks to maximize its utilization of MWBEs in its procurement of goods/supplies, services, and maintenance and maintenance-related services. The purpose of this RFP is to conduct a Phase 2 study to determine if there is a disparity between the number of MWBEs that are ready, willing, and able to perform services, goods and supplies, and maintenance and maintenance-related contracts and the numbers of these same companies who are actually participating in these types of contracts with the School Board. In order to provide the deliverables listed below, the selected Proposer is expected to perform the services at appropriate points during the contract period. The scope is not all inclusive and shall only be considered as a guideline for expected work required in completing the study. The selected Proposer shall perform all tasks necessary to provide the agreed upon deliverables in accordance with applicable legal and industry standards, regardless of whether the tasks are specifically listed in this RFP. The Board will assign a project manager to monitor the deliverables and to assist the successful proposer in obtaining the data necessary to complete the study.

The selected Proposer shall:

A. Conduct and deliver a comprehensive disparity study that is a statistical analysis of the availability and utilization of MWBEs in the identified School Board contracts for fiscal years 2012, 2013, and 2014 (July 1, 2012 through June 30, 2015). The study must be legally supportable and meet all current applicable judicial tests and other criteria required by law and this RFP.

B. Develop a representative list of commodities and services typically procured by the Board in the identified areas.

C. Define the relevant market for assessing the availability of MWBEs that might participate in the Board’s contracts issued and awarded.

D. Define the relevant geographical market for assessing the availability of MWBEs to participate in the Board’s procurement process.

E. Identify, define, research, compile and analyze all data required to conduct the disparity study. To the extent possible, the Board will make records available and cooperate in retrieving the records. The records will be available in various formats including the Internet, computer databases, spreadsheets, microfilm, and hard copies. Where actual procurement data and records are incomplete, the Proposer may use statistically valid sampling and estimating methods as appropriate. However, the Proposer is responsible for the legal sufficiency of any and all methods used.

The Proposer shall also:

1. verify the factual accuracy of all relevant data collected.
2. collect and analyze anecdotal evidence from MWBEs and from non-MWBEs concerning discriminatory or other unfair experiences doing business, or attempting to do business, with the Board including experience of institutionalized discrimination and/or individual disparate treatment.
3. conduct surveys, personal interviews, public hearings, and/or other information gathering techniques to solicit comments and testimony from MWBEs and any
other persons knowledgeable regarding discrimination in the Board’s procurement process.

F. Analyze the Board’s contracting and procurement data and calculate the share of contracts awarded to M/WBEs and non-M/WBEs as either prime vendors or subcontractors based on total awards, expenditures, payments and trends.

G. Identify the categories of contracts for goods/supplies, non-construction-related professional services, and maintenance and maintenance-related services.

H. Data review shall include data sources for contracts with and without SBE/MBE participation which includes M/WBEs.

I. Determine the availability of M/WBEs by race, ethnicity and gender in the relevant market area used by the Board for each category of goods/supplies, services, and maintenance and maintenance-related services procured by the Board. The analysis of availability shall include a detailed and comprehensive definition of the study’s measure of availability and identify how the availability was calculated. The analysis of availability shall also include a determination of the relative availability of ready, willing and able M/WBE firms as compared to non-M/WBE firms within the relevant market area and shall address or otherwise account for differences in capacity as a possible explanation for any identified disparities in utilization as compared to availability for all goods and services purchased by the Board in the categories identified in paragraph H. The availability analysis shall research, identify, and document all sources of data and methods relied upon to establish a legally defensible estimate of percentage of availability of qualified M/WBEs by race, ethnic group and gender in the relevant market area for each contract category.

The Proposer shall, at a minimum, use the following methods to identify M/WBE availability:

(1) Review the directory of certified M/WBEs of the Board’s Office of Economic Opportunity (OEO) (http://oeo.dadeschools.net), the Southern Florida Minority Supplier Development Council, Miami-Dade County, Office of Supplier Diversity-State of Florida, Broward County, Broward County Public Schools, and other agencies that certify M/WBEs.

(2) Categorize each identified M/WBE according to the classification of being a provider of goods/supplies, services, maintenance and maintenance-related services, with a notation of each MWBE’s applicable National Institute of Government Procurement code (NIGP) or Division of Purchasing and Materials Management commodity/service code if no NIGP code exists.

(3) Indicate the total number of M/WBEs identified for each classification and in total.

(4) Determine an estimated fraction of businesses within the State of Florida area that are owned by M/WBEs, broken down by classification (i.e. goods/supplies, services, maintenance and maintenance-related services).

(5) Determine the market areas relevant to the School Board procurement area by classification, and provide a market area distribution of the M/WBEs throughout
each market area. The Proposer shall provide an analysis, by classification, of the availability of MWBEs in each of the market areas of the School Board.

(6) Determine whether there is evidence that racial, ethnic or gender discrimination adversely affects the capacity of M/WBE firms or otherwise affects the availability of MWBEs and summarize and present any such findings.

J. In accordance with current law and appropriate statistical research methodology, determine the appropriate methodology for extraction and analysis of procurement and contract data related to disparity analysis for the Board during the relevant time period.

K. Determine the utilization of M/WBEs, by race, ethnic group and gender, by the Board for the relevant time frame through a review of all or a statistically significant portion of the Board’s respective contracts for the identified contracts.

L. Determine the utilization of M/WBEs within the relevant market area in contracts with non-M/WBE firms on private and public sector jobs in all of the identified categories.

M. Determine whether there is a statistical disparity between the availability of qualified, ready, willing and able M/WBEs in each of the identified contract categories and the utilization of these businesses by the School Board or by its prime contractors categorized by race, gender and ethnicity. All study methodologies used to identify any disparity or disparities shall be thoroughly researched, reviewed and documented in order to withstand legal challenge. The Proposer shall use, but not be limited to, the following methods to determine and analyze utilization:

(1) Identify and evaluate a statistically sound sampling of contracts under $50,000 from each of the various commodities. Board staff must approve and/or agree to the sampling methods prior to implementation.

(2) Identify and classify the contracts according to the following four major classifications. The Proposer shall also address sub-groups within a classification whenever the level of contracting activity suggests that sub-groups are appropriate. The contracts shall be classified according to the NIGP codes or the Division of Purchasing and Materials Management’s commodity/service code if no NIGP code exists. The Proposer shall determine the number of contracts awarded in each classification.

(a) Goods/Supplies
(b) Services
(c) Maintenance
(d) Maintenance related services

(3) Specify both the total number of contracts and the total dollar value of the contracts for each classification.

(4) Determine the number of contracts awarded to M/WBEs and non-M/WBEs and the total dollar-value of the contracts awarded to M/WBEs and the amounts actually paid to the companies for each classification. The Proposer shall also determine (1) the percentage of contracts awarded to M/WBEs by comparing the number of contracts awarded to M/WBEs to the total number of contracts, (2) the
percentage of the dollar-value of the contracts awarded to M/WBEs by comparing the dollar-value of such M/WBEs contracts to the total dollar-value of all contracts, and (3) the percentage of the amounts actually paid to the M/WBEs by comparing the amounts paid to the M/WBEs to the total amounts paid.

(5) Determine the number of contracts awarded for each classification in which the prime contractor subcontracts with an M/WBE and the total dollar-value of such subcontracts. The Proposer shall also determine (1) the percentage of contracts awarded in which the prime contractor subcontracts with an M/WBE by comparing the number of such contracts to the total number of contracts, (2) the percentage of the total dollar-value of the contracts in which the prime contractor subcontracts with an M/WBE by comparing the total dollar-value of such subcontracts to the total dollar-value of all contracts, and (3) the percentage of the amounts paid to M/WBE subcontractors by comparing the total amounts paid to the M/WBEs to the total dollar-value of all subcontracts.

(6) Review contract award data, expenditure information, as well as actual payments made to M/WBEs to determine the utilization of M/WBEs which were awarded contracts and/or subcontracts by the School Board during the study period.

(7) Determine general trends from the point that records and data are available and expected future trends.

(8) Analysis shall use appropriate statistical standards in identifying and differentiating disparities that are statistically significant from those that are not, as well as calculating confidence levels in sample sizes. To the extent possible, the Proposer shall apply relevant multivariate/regression analysis to determine whether any factors other than discrimination may account for observed statistical disparities between availability and utilization.

N. Conduct an analysis of statistical disparities, if any, of the percentage of all prime contract and subcontract revenues earned by M/WBEs under contracts awarded by the School board or businesses in the relevant market area by race, gender, and ethnicity for each contracting category applying controls for similar types of contracts.

O. Conduct a statistical comparison of public sector utilization (non-county) to availability by race, gender and ethnicity to determine any public sector disparity ratios in the relevant market area. Where disparities are identified, the Proposer shall examine whether race- and gender-neutral contracting procedures are used.

P. Conduct a statistical comparison of private sector utilization to availability by race, gender and ethnicity to determine any private sector disparity ratios in the relevant market area utilizing controls for similar kinds of contracts issued by the School Board and identify any nexus between the specific prime contractors and vendors that the School board has used and the identify of firms that have been awarded contracts and/or subcontracts in the private sector of the relevant marketplace. The Proposer shall identify any patterns of exclusion in the private sector of the relevant marketplace. The Proposer shall identify any patterns of exclusion in the private sector marketplace of M/WBE subcontractors that have successfully performed for the school board but have not been utilized outside of the public sector contracts. The proposer shall explore whether there are market dynamics that may account for such patterns, e.g., negotiated
contracts with owners, less than full open competition, differences in solicitation practices, differences in profit margins and bidding competition. From this evidence, the Proposer shall make a finding regarding whether the School Board is a passive participant in discrimination as a result of its utilization of private sector business.

Q. Conduct a detailed analysis of the effects, if any, of over-concentration of M/WBE firms and non-M/WBE firms in specific sub-contracting categories. This shall include analysis of whether firms size and experience have any effect on reported disparities, as well as any barriers to entry that may be caused by various forms of discrimination, e.g., unequal access to capital, stereotypical attitudes by prime contractors, good old boy networks between prime contractors and certain subcontractors in other industry categories that may account for such over-concentration on the basis of race and gender.

R. Conduct an analysis of statistical disparities, if any, concerning the access of M/WBE firms to commercial capital, credit, bonding, and business, family, and social networks, as compared to non-M/WBE firms while holding balance sheet and creditworthiness information constant. The Proposer shall compare bonding levels and bonding rates of M/WBE firms to SBE/MBE firms that are non-minority. The Proposer shall account for any factors other than race or gender, e.g., firm age, education, performance track record, or home equity that may account for any differences. To the extent disparities are identified, the Proposer shall provide analysis of the likely effects of any such disparities upon relative capacity and growth rates for M/WBE firms.

S. Determine the availability of non-certified firms by race, gender, ethnicity, and capacity in Miami-Dade County that appear to be eligible to meet the requirements for certification as SBE/MBE and/or M/WBE.

T. Obtain and analyze prior disparity and availability studies for the identified contract categories related to the School Board, and to the extent possible reconcile or distinguish those studies with the current findings. The study shall review previous disparity study recommendations and indicate progress towards implementing the student recommendations.

2.5 QUALITATIVE EVIDENCE

If the study reveals an underutilization of M/WBEs that are ready willing and able to participate in the School Board’s Contracts, the Proposer shall:

A. Research, analyze and report the reasons for the underutilization.

B. Conduct a detailed, in-depth review of the School board’s purchasing and contracting policies to determine whether any of the board’s policies and procedures or practices have a discriminatory effect or adverse impact on M/WBE utilization in awarding of contracts and subcontracts. Any statistical disparity finding that is tied to School Board purchasing or contracting policies or practices must be well documented by quantitative data.

C. Document and explain through a combination of quantitative statistical analysis and qualitative evidence that provides insight into the nature and form of discrimination or other barriers that are affecting outcomes in the marketplace. Such analysis shall include
an evaluation of the extent to which any such identified disparity has likely been caused by race, ethnic and gender discrimination by the School Board itself or by actors in the private marketplace, and/or by other factors including, but not limited to, length of time in business or business size. The Proposer shall indicate the extent to which discrimination has had an adverse effect on the ability of M/WBEs to compete in contracting and awards in the Board’s procurement processes. The Proposer shall consider relevant statistical, historical, sociological and anecdotal evidence and other variables that may have impeded the formation, growth, availability or utilization of M/WBEs. The Proposer shall consider the use of appropriate methodologies for gathering and analyzing anecdotal or qualitative evidence regarding marketplace discrimination and other barriers, e.g., public hearings, in-depth personal interviews or marketplace participants, surveys and focus groups.

2.6 REMEDY ANALYSIS

If the Proposer finds no evidence of disparity and/or discrimination, the Proposer shall present its quantitative and qualitative findings to the School Board.

If discrimination is identified, the Proposer shall:

A. Assess what level of participation would otherwise be achieved in the relevant market in the absence of the effects of discrimination and the extent to which the effects of discrimination have been mitigated by existing programs established by the school board.

B. Conduct an analysis of whether the School Board is a direct or passive participant in racial, ethnic or gender discrimination. The Proposer shall investigate, describe and evaluate practices that may indicate discrimination in the relevant market places that are the subject of the disparity study. In addition, the study shall identify any links between the School Board’s expenditure of public funds to any direct or passive discrimination occurring in, by or through the relevant marketplace.

C. Identify programs and policy and practice changes that will further address discrimination through race and gender-neutral means. If the Proposer determines that neutral means are unlikely to be effective in eliminating identified disparities, the Proposer shall also identify and recommend narrowly tailored race- and gender-conscious remedies. In so doing, the Proposer shall explore the efficacy of race- and gender-neutral remedies alone and make findings and recommendations as to whether additional race-and gender-conscious remedies are likely to be necessary to remedy the effects of identified marketplace discrimination.

D. Evaluate the effectiveness of any alternative race- and gender-neutral policies and initiatives that have been used by the School Board, including but not limited to the Small and Micro Business Enterprise Program, or by other governments, within its relevant geographic market, in eliminating the effects of discrimination and/or increasing M/WBE participation in public contracting.

2.7 PROGRAM REVIEW

The Proposer shall review current and past procurement policies, programs, laws, rules, regulations, procedures, processes, and practices of the School Board in order to determine
whether the policies, programs, laws, rules, regulations, procedures, processes, and practices are discriminatory against MWBEs on their face or in practice or the extent to which prior efforts have assisted MWBEs to participate on a fair basis in contracting activities. As part of such review and evaluation, the Proposer shall:

A. Review and analyze the School District’s policies, procedures, and practices related to the procurement of small contracts (i.e. less than an annual value of $50,000). The Proposer shall document the consultant’s findings and provide specific recommendations.

B. Review and analyze the policies, procedures, and practices of the Office of Economic Opportunity (OEO) and the Small/Minority Business Enterprise program, the Office of Procurement, and the Maintenance Department, including, but not limited to, program management, data collection, goal setting, certification processes, compliance, and outreach programs. The Proposer shall document the results of each review, identify the strengths and weaknesses of each Office, and make recommendations for improvement.

C. Recommend changes/revisions to current procurement policies, programs, laws, rules, regulations, procedures, processes, and practices in order to enhance the participation of MWBEs in School Board contracts and improve legal compliance.

D. Review SBE and M/WBE programs of other comparable government agencies in geographic proximity to the school Board, report on whether any of those programs or portions of programs have resulted in increasing M/WBE participation, and make recommendations regarding whether the School Board should consider these programs.

2.8 FINAL STUDY REPORT

The study shall be completed, including the final report, within one (1) year from the date of the award. Upon completion of the above work, the Proposer shall:

A. Deliver a detailed draft report of all findings and recommendations. The School Board shall be provided a reasonable time to review the draft report and provide the Proposer with detailed feedback regarding factual or statistical errors, areas in need of clarification, areas where legal sufficiency of findings and recommendations appear to be lacking, and where additional research is required.

B. Make revisions to the draft study, based upon its own professional judgment, after receiving comments and proposed edits to the draft study from the School Board. The final student will present findings on availability, utilization, and disparity as well as for any other statistical and qualitative analysis discretely for each of the contract classifications identified in this RFP. The analyses and findings must be disaggregated on the basis of race, ethnicity and gender groupings.

C. Prepare and deliver a final report that contains the following minimum elements:

(1) Executive summary of findings, conclusions and recommendations;
(2) Definition section that includes a definition of all racial, ethnic and gender groups considered in the report;
(3) Background section that includes detailed descriptions of all pertinent methodology, data sources, results, conclusions, findings, recommendations;

(4) Legal analysis section that includes a description of the legal framework for the disparity study analysis to specifically include controlling federal and Florida statutes and court decision;

(5) Assumptions section discussing all assumptions that influenced the analysis;

(6) Methodology section describing the methodologies used in data collection and evaluation, availability, utilization, analysis and anecdotal evidence;

(7) Description of data sources analyzed, including summaries; and

(8) Analysis of availability, utilization, statistical disparity or disparities, School Board purchasing policies and procedures and other anecdotal evidence which may impact disparity.

2.9 DATABASE

The Proposer shall provide, in a format approved by the School Board, a computerized database of all data and records developed in performing the services that will permit that will permit future use of the data and records by the school Board.

2.10 PRESENTATIONS

The Proposer shall be required to give a final presentation of the Phase 2 Disparity Study to the School Board, administration, and all other departments and/or community groups as determined by the project manager.

2.11 WORK PRODUCT(S)

As stated within Section 6.0 of the draft Agreement, specifically #16, Patents, Copyrights and Royalties, all work products produced as a result of this work shall be the property of the District. As such, upon reasonable notice, the District may request copies and/or inspect work papers associated with the completion of work.

2.12 SPECIFIC TASKS AND DELIVERABLES PERFORMANCE GOALS

During the term of the contract, the awarded Proposer shall adhere to the below-referenced tasks and deliverables. Each task and deliverable will be reviewed quarterly to ensure compliance to the contractual terms and conditions. However, this list is not exclusive. The successful Proposer will be expected to perform all tasks necessary to provide the agreed upon deliverables, regardless of whether such tasks are on the list below. The tasks and deliverables are as follows:

Proposer shall submit a detailed Draft Work Plan that includes a phased approach, tasks, milestones, deliverables and project schedule for the scope of services described herein. The Draft Work Plan shall include components necessary to provide a Disparity Study that the Proposer deems appropriate to meet legal requirements, best practice, and the requirements of the Board as set forth in this Request for Proposals.

Interview appropriate School District staff regarding types of contracts and market areas covered by solicitations, advertising, and mailing.
Obtain and analyze prior disparity and availability studies that relate to the relevant market area, and to the extent possible reconcile or distinguish those studies with the current findings. Research and analyze the level of M/WBE availability and utilization by M/WBE category in the relevant market area with respect to each type of contract typically awarded by the School District.

Interview the School District’s staff in the Office of Economic Opportunity/M/WBE, and review the records for information regarding the number and identify of M/WBEs.

Monthly written progress reports submitted to the Board’s Project Manager, in addition to attending in-person meetings to assess the progress report. While the exact number of meetings is not known, the Board’s Project Manager may conduct such meetings via teleconferencing to reduce costs. The frequency of these meetings will be dictated by timeliness in meeting the timetable and the quality of the work product. The meetings will be scheduled by the Board’s assigned Project Manager;

Design and administer a survey of contractors, subcontractors, vendors and consultants, by ethnic group and gender, as to the type of work, capacity and utilization on various types of contracts, reasons for levels of utilization, identification of any instances of discrimination (past or present) and the effects of sources of past or present discrimination, and interest in bidding (or submitting proposals) on the School District’s contracts.

Analyze any available judicial or administrative public hearing transcripts, summaries, or findings, as to the allegations of commercial discrimination made against contractors, subcontractors, vendors, consultants, and local governmental agencies.

Summarize anecdotal evidence collected and analyzed in other disparity studies from the relevant geographical market for the School District;

Assist School District staff, as necessary, in preparation of testimony and presentation of Disparity Study findings and recommendations to The School Board of Miami-Dade County, Florida.

Should any independent review of the methodology used to complete the study reveal inadequate methodologies to have been used which are not consistent with current legal renderings, the selected Proposer agrees to make necessary modifications and conduct any subsequent work necessary to achieve study adequacy and appropriateness at no additional cost to the Board.

2.13 REQUIRED INFORMATION TO BE SUBMITTED BY THE PROPOSER

The proposal submitted must clearly indicate the name of the responding firm, as well as the name, address, and telephone number of the primary contact at proposer’s organization. The Proposer shall demonstrate their experience in the facilitating Disparity Study Services.

In no more than twenty (20) pages, the Proposer must provide the following:

A. A Plan to address all elements noted within Sections 2.4 through 2.9;

B. Documentation of a minimum of ten years’ experience providing disparity study services to government and/or similar organizations to the District;
C. Each Proposer must submit three to five executive summaries of disparity studies conducted for governmental entities within the last ten (10) years. It is preferred that the submissions include at least one of each of the three following types of information and/or findings as are typically associated with a Comprehensive Disparity Study Report:

(1) A finding of disparity in government contracting that is attributable to a corresponding finding of discrimination.
(2) A finding of disparity in government contracting with no corresponding finding of discrimination.
(3) A finding of no disparity and no discrimination in government contracting.
(4) If any of the three above-referenced executive summaries were not performed, indicate so in the Proposal.

Each Proposer shall describe any program that was implemented as a result of Proposer’s recommendations indicating whether such program was legally challenged and the result of any such legal challenge.

D. Three references regarding work experience from organizations of comparable size, complexity, and diversity;

E. Resumes of all potential presenters/trainers;

F. Cost proposal, as stated in Section 3.0, including all elements listed above in Section 2.0; and

G. Any other relevant information and/or additional service/incentive that can be used by M-DCPS in the proposal evaluation process.

The Remainder of this Page was Left Intentionally Blank.
SECTION 3.0 - PRICE PROPOSAL

[Signature is required at the end of this Section 3.0]

Proposer must complete this section in its entirety, and may supplement this section with additional pages as to provide the District with a more detailed breakdown, backup and/or options of related cost associated with the services being solicited in this RFP.

Provide itemized detail for each fee within an Excel spreadsheet. This overall amount will be totaled and used in a calculation to assign the allocable points to the Pricing Section of the response.

The fees quoted are to include all travel and living expenses for the solution proposed. The Total Fees proposed will be firm and fixed for the life of the contract, a period of one year, with two (2) one year contract extensions.

3.1 PRICE PROPOSAL FOR DISPARITY STUDY SERVICES

Each Proposer MUST submit a line item budget, including explanations for the program requirements listed in Section 2.0, including but not limited to all services, materials, training, maintenance and fees.

The fees quoted are to include all travel and living expenses for the solution proposed. The Total Fees proposed will be firm and fixed for the life of the contract, a period of one (1) year, with one (1) one-year contract extension.

The information in this RFP is to be utilized solely for preparing the proposal response to this RFP and does not constitute a commitment by the District to procure any product in any volume.

For this Section 3.2 - Price Proposal:

_________________________________________  __________________________
Signature of Proposer’s Authorized Representative  Title

__________________________________________    __________________________
Printed Name:            Date:
SECTION 4.0 - PROPOSAL SUBMISSION AND FORMAT

This Section identifies the format to be followed in assembling a response. Proposers must carefully follow the format and instructions outlined below, creating a tabbed section in the response for each of the sections in 4.1 below. Proposers are instructed to indicate a response to ALL requirements and specifications contained in this Section in the order listed using the same numbering system.

Proposal responses must contain each of the enumerated documents below, each fully completed, signed, and notarized as required. Proposals that do not include the required documents may be deemed ineligible and may not be considered for contract award. All materials (except for plans and schematics, if any) are to be submitted on 8½” X 11” paper, neatly typed on one side only, with normal margins, spacing and quantities as outlined in Section 1.9 of this RFP.

The inability or denial expressed in a proposal, or omission in the proposal, to offer to comply/conform with the technical requirements of this Section of the RFP may result in deductions in the allocation of points by the Selection Committee.

CONTENTS OF PROPOSAL

All proposals must contain the following tabs/sections:

1) **Cover Page**

   *Exhibit 1* found in Section 7 is to be used as the cover page for the Proposal. This form must be fully completed and signed by an authorized officer of the Proposer submitting the proposal.

2) **Table of Contents**

   The Table of Contents should outline in sequential order the major areas of the proposal. All pages of the proposal, including the enclosures, must be clearly and consecutively numbered and correspond to the Table of Contents.

3) **Executive Summary**

   Provide a brief summary of no more than two (2) pages describing the basic services offered, experience and qualifications of the Proposer, staff and any other relevant information.

4) **Technical Qualifications** *(Possible 40 Points)*

   Provide a response to all of the items listed in Section 2.0 of this RFP. If the Proposer is unable to provide a particular service, the Proposer is required to suggest an appropriate alternative in their response to that item. The Proposer must respond to ALL Requirements in the order listed in Section 2.0 of this RFP using the same numbering system. The inability or denial expressed in a proposal, or omission in the proposal, to offer solutions or an explanation to the requirements of this section may result in
deductions of the allocation of points by Selection Committee members under the weighted evaluation criteria.

5) Qualifications of the Proposer including Corporate Past Performance & Key Personnel (Possible 25 Points)

Provide a response regarding the Proposer’s qualifications, including but not limited to the following: full name, address and brief description of Proposer’s organization. Also, provide a description of the organization’s qualifications to provide the scope of services requested in this RFP, whereby resumes of Key personnel should be included within the Proposal. Lastly, please provide three (3) references whereby your company has successfully provided services requested within this RFP.

6) Price Proposal (See Section 5.2; Possible 30 Points)

The Price Proposal, as outlined within Section 3.0, shall be submitted per the directions in that section. Be sure to include your signature as it appears on Section 3.0.

7) Small Business Enterprise/MBE participation (Possible 5 points)

As stated in Section 1.14 and Section 1.46 of the RFP, the District has a strong commitment to SBE/MBE participation. As such, all Proposers who have obtained the SBE certification and verified by the OEO office, may be eligible for 5 points. Evidence of SBE certification must be submitted with the Proposal.

8) Required Forms & Attachments

The Proposer must complete, sign and submit the following forms available in Section 7.0 as part of the Proposal. If awarded a contract, the Proposer will be asked to submit a Proposer registration packet that will include all of the forms listed in Section 7.0.

- Exhibit 1  Cover Page for Proposal
- Exhibit 2  Affidavit Identifying Authorized Representative(s) for Selection Committee Proceedings (RFP Process)
- Exhibit 3  Acknowledgment of Amendments
- Exhibit 4  Local Business Affidavit of Eligibility
- Exhibit 5  Florida Statutes on Public Entity Crimes
- Exhibit 6  Vendor Experience
- Exhibit 7  Anti-Collusion Statement
- Exhibit 8  Disclosure of Employment of Former School Board Employees

9) Proposed Agreement (Sample Contract)

By submitting a proposal, the Proposer agrees to be bound by and to execute the Sample Agreement proposed in Section 6.0 of this RFP.
4.2. PROPOSAL PREPARATION REQUIREMENT

(1) All RFP Proposers must submit one (1) unbound, one-sided original and eight (8) bound copies of the complete proposal, eight (8) electronic versions on CD or USB drive. See Section 1.9.

(2) All proposals must be submitted on 8 ½” X 11” paper, except for any drawings, charts, diagrams, and bound, tab divided by designated category. Binders will have clearly printed front, back and spine title covers that clearly identify the proposal subject, due date and Proposer’s contact information.

(3) The original, the soft copy and all copies must be submitted in a sealed envelope/container. Proposers shall include their complete name, return address, and telephone number on the left upper side of mailing label. The RFP title, number, due date and opening time will be clearly printed at the bottom left side of the label. Such outer envelope/container should be addressed as specified below:

4.3 PROPOSAL LABELING REQUIREMENTS

The box below, with all appropriate information, must appear as a label to allow proper processing of proposal. The label will allow the Buyer to properly handle the sealed container without revealing the contents until the proposals are opened.

```
SEALEO PROPOSAL ENCLOSED
(To be opened by the Contact Person noted below)

Proposer’s Name:
Proposer’s Address:
Proposer’s Telephone Number:

BID BOX
Miami-Dade County Public Schools
Procurement Management Services
Attn: Melody Thelwell, MPA
Chief Procurement Officer
School Board Administration Building
1450 NE 2nd Avenue, Suite 650
Miami, FL 33132

RFP No.: RFP-15-034-MT
RFP Title: Disparity Study Services
Proposal Due Date: Thursday, January 28, 2016 by 2 p.m. EST (local time)

Balance of page intentionally left blank
```
SECTION 5.0 - EVALUATION/SELECTION PROCESS

5.1 COMPETITIVE RFP PROCESS

(a) The selection process under this RFP shall be a competitive process that shall utilize and be governed by the authority, methodology and guidance established within School Board Policy 6320, Purchasing, located on the District’s website at www.procurement.dadeschools.net.

(b) Also see Section 1.0 of this document for additional information and provisions applicable to this competitive RFP process.

5.2 EVALUATION CRITERIA

The Selection Committee will evaluate and rank all eligible and responsible proposals based on the evaluation criteria listed below. The criteria are itemized with their respective weights for a maximum available total of one hundred (100) points. A Proposer may receive all or a portion of this amount depending on the merit of the proposal and in relation to the competing proposals as determined by the Selection Committee.

The following criteria will be evaluated when ranking the proposals:

<table>
<thead>
<tr>
<th>Criteria for Evaluation</th>
<th>Available Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Qualifications</td>
<td>40</td>
</tr>
<tr>
<td>(See description at Section 2.0)</td>
<td></td>
</tr>
<tr>
<td>Price Considerations</td>
<td>30</td>
</tr>
<tr>
<td>(See description at Section 3.0)</td>
<td></td>
</tr>
<tr>
<td>Proposer Qualifications including Corporate Past Performance &amp; Key Personnel</td>
<td>25</td>
</tr>
<tr>
<td>(See description at Section 4.0 # 5.)</td>
<td></td>
</tr>
<tr>
<td>Small Business Enterprise/MBE participation</td>
<td>5</td>
</tr>
<tr>
<td>Total Points</td>
<td>100</td>
</tr>
</tbody>
</table>

5.3 NEGOTIATIONS WITH RESPONSIBLE PROPOSERS AND REVISIONS TO PROPOSALS

The Selection Committee, a subcommittee thereof, or such other committee or qualified staff, all as determined and appointed by the Superintendent, may conduct negotiations with:

(i) responsible Proposers determined to be in the competitive range;
(ii) the highest ranked Proposer when the Selection Committee established a competitive range and has completed its final evaluation of proposals;
(iii) the highest ranked Proposer when the Selection Committee determines not to establish a competitive range; or
(iv) a sole Proposer when only one proposal is received.
a) *Purposes of Negotiations.* Negotiations are held to:

(i) promote understanding of the District’s requirements and the Proposers’ proposals; and

(ii) facilitate arriving at a contract that will be most advantageous to the District taking into consideration price and the other evaluation factors set forth in the Request For Proposals.

(iii) *Authorized Representatives.* Any representative of a Proposer participating in oral presentations or negotiations for the Proposer shall be listed on an affidavit (Exhibit 2) submitted with the proposal.

(iv) *Meetings.* All negotiations shall be conducted in accordance with the applicable “Government in the Sunshine Law,” Section 286.011, Florida Statutes, as same may be amended from time to time.

b) *Best and Final Offers.* When in the best interest of the District, the Selection Committee may request, through the Buyer, the submission of best and final offers from all Proposers remaining in the competitive range. The request for best and final offers shall be in writing and shall establish a common date and time for the submission. Proposers shall be informed that if they do not submit a best and final offer or a notice of withdrawal, their immediate previous offer will be construed as their best and final offer. Best and final offers shall be submitted only once and shall be evaluated by the Selection Committee; provided, however, the Selection Committee, through the Buyer, may make a written determination that it is in the District’s best interest to conduct additional negotiations with more than one Proposer or change the District’s requirements and require another submission of best and final offers which shall be evaluated by the Selection Committee.

c) *Completion of Negotiations.* When the Selection Committee has established a competitive range, and when the Selection Committee has completed its final evaluation of proposals, with or without best and final offers, the Selection Committee may continue, and attempt to complete, negotiations with the highest ranked Proposer. The Selection Committee through the Buyer will make recommendation of award to the School Board or its committees.

5.4 PRICE

A completed price proposal under this RFP must be submitted by Proposers at the time of proposal submission with each proposal package. See *Section 3.0 – PRICE PROPOSAL*

5.5 ORAL PRESENTATIONS, NEGOTIATIONS AND PRODUCT DEMONSTRATIONS/SITE VISITS

(a) The firms in the competitive range may be invited to individually make oral presentations of their proposal and participate in negotiations.

(b) Oral presentations will consist of an overview of the submitted proposal of each of the Proposers in the competitive range, and specific questions regarding items specific to the proposal being reviewed. NO additional information will be provided by the Proposer during
these presentations. Product/service demonstrations and/or site visits may also be requested, and scheduled, at any time by the Selection Committee, through the Buyer, of firms remaining in the competitive range.

5.6 GOVERNMENT IN THE SUNSHINE LAW

All oral presentations, negotiations and product demonstrations under this RFP process shall be conducted openly in accordance with the “Government in the Sunshine Law,” Section 286.011, Florida Statutes, as amended.

5.7 AWARD

Contract award shall be made to the responsive and responsible Proposer whose proposal is determined to be the most advantageous to the District taking into consideration the evaluation factors set forth in the Section 5.2, above. No other factors or criteria shall be used in the evaluation. The recommendation of the selection committee shall be submitted through the Buyer to the School Board.

In this RFP Process, the award decision will be made by the School Board, whose decision shall be final.

The Remainder of this Page was left Intentionally Blank.
SECTION 6.0 – SAMPLE AGREEMENT
TO BE EXECUTED WITH AWARDED PROPOSER
PURSUANT TO THE DISTRICT, IN ITS SOLE DISCRETION, SHOULD RE-SERVICE ITS
RIGHT TO INSERT ADDITIONAL PROVISIONS, AS NEEDED

RFP NO.: 15-034X-MT
FOR
Disparity Study Services

THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA
AGREEMENT FORM FOR CONTRACTED SERVICES

THIS AGREEMENT, entered into this _____ day of ____________, 20____, by and between The School Board of Miami-Dade County, Florida, a political subdivision of the State of Florida hereinafter referred to as the “School Board,” and ___________________________ (Legal Name of Contracting Party/Organization) hereinafter referred to as the “CONTRACTOR,” is as follows:

1. SCOPE OF WORK
   The Contractor shall, in a satisfactory and proper manner as determined by the School Board, perform the following:

   Nature of Contracted Services:
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

   Anticipated Outcome of Contracted Services:
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

   Location of Contracted Service:
   __________________________________________________________

   Date(s)/Hours of Service:
   __________________________________________________________

2. TERM OF AGREEMENT
   The Contractor shall commence performance of the Agreement on the ____ day of ___________, 20__, and shall complete performance to the satisfaction of the School Board no later than the ____ day of ___________, 20__. The School Board reserves the right to terminate this Agreement without cause by giving thirty (30) days written notice to the Contractor.

3. COMPENSATION
   The School Board shall, upon completion of services by the Contractor, compensate the Contractor in an amount not to exceed $__________________, which shall constitute the amount due under this Agreement.
Agreements exceeding $50,000 require School Board approval. The Contractor agrees to assume responsibility for all per diem and travel expenses, unless authorization to incur such expenses is granted by the School Board in advance of the expenditures being incurred. The Contractor shall be reimbursed for such approved expenditures as provided by §112.061 Florida Statutes, and School Board Policy 6550.

4. PAYMENT SCHEDULE
Payment will be generated by the School Board's Accounts Payable Department within thirty (30) days after completion of services. Payment will be made as indicated below:

- one lump sum payment in the amount of $_______ upon completion of services
- ______ partial payments in the amount of $_______ after/before each ______________

Please see payment schedule hereto attached and incorporated into this Agreement.

5. REGULATIONS & ORDINANCES
The Contractor shall comply with all applicable laws, ordinances, codes, rules and regulations of federal, state and local governments being licensed, if required, for performance of any work under this Agreement.

6. CONFIDENTIALITY OF STUDENT RECORDS
Contractor understands and agrees that it is subject to all federal and state laws and School Board Policies relating to the confidentiality of student information. Contractor further agrees to comply with the Family Educational Rights and Privacy Act (“FERPA”), 34 C.F.R. §99 et. seq. Contractor shall regard all student information as confidential and will not disclose the student information to any third party.

7. ENTIRE AGREEMENT
It is understood and agreed that this Agreement contains the complete understanding and agreement of the parties. No stipulation, agreement or understanding shall be valid or enforceable unless contained in this Agreement. No representations or statements made by any employees, agents or representatives of either party shall be binding on either party as a warranty or otherwise, except as expressly set forth herein.

8. GOVERNING LAW; VENUE
This Agreement shall be governed by, and construed in accordance with the laws of the State of Florida. In the event of litigation, venue for any claim shall lie exclusively in a court of competent jurisdiction in Miami-Dade County. All parties shall be responsible for their own attorneys’ fees.

9. INDEMNIFICATION
To the fullest extent permitted by law, the Contractor shall indemnify and hold harmless the Board, and its employees (“Indemnitees”) from and against all claims, liabilities, damages, losses, and costs including, but not limited to, reasonable costs and attorneys’ fees at the pre-trial, trial and appellate levels, arising out of, resulting from or incidental to Contractor’s performance under this Agreement or to the extent caused by negligence, recklessness, or intentional wrongful conduct of the Contractor or other persons employed or utilized by the Contractor in the performance of this Agreement. The remedy provided to the Indemnitees by this indemnification shall be in addition to and not in lieu of any other remedy available under the AGREEMENT or otherwise. This indemnification obligation shall not be diminished or limited in any way to any insurance maintained pursuant to the AGREEMENT otherwise available to the Contractor. The remedy provided to the Indemnitees by this indemnification shall survive this AGREEMENT. The remedies of this Section shall specifically survive the termination of this Agreement. The provisions of this Section are intended to require the Contractor to furnish the greatest amount of indemnification allowed under Florida law. To the extent any indemnification requirement contained in this Agreement is deemed to be in violation of any law, that provision shall be deemed modified so that the Contractor shall be required to furnish the greatest level of indemnification to the Indemnitees as was intended by the parties hereto.
10. DUTY TO DEFEND
The Contractor agrees, at its own expense, and upon written request by the Board, to defend any suit, action or demand brought against the School Board on any claim or demand arising out of, resulting from or incidental to Contractor’s performance under this Agreement.

11. TERMINATION AND SUSPENSION
The School Board reserves the right to terminate this Agreement at any time and for any reason, upon giving thirty (30) days prior written notice to Contractor. If said Agreement should be terminated for convenience as provided herein, the School Board will be relieved of all obligations under this Agreement. The School Board shall only be required to pay the Contractor the amount for services performed prior to termination of the Agreement. The School Board may terminate this Agreement upon thirty (30) days advance written notice to the Contractor, for default of Contractor, or due to lack of, or cancellation of, grant funds made available to the School Board by a Federal grantor agency. Upon receipt of a notice of termination, the Contractor shall cease incurring additional obligations under this Agreement. However, the School Board shall allow the Contractor to incur all necessary and proper costs, which the Contractor cannot reasonably avoid during the termination process. Each payment obligation of the School Board created by this agreement is conditioned upon the availability of funds that are appropriate or allocated for the payment of services or goods. If such funds are not allocated and available, this agreement may be terminated by the School Board at the end of the period for which funds are available. The School Board shall notify the Contractor at the earliest possible time before such termination. No penalty shall accrue to the School Board in the event this provision is exercised, and the School Board shall not be obligated or liable for any future payments due or for any damages as a result of termination under this section.

12. DEFAULT
If the Contractor fails to fulfill or comply with any of the terms or conditions of the Agreement, in whole or in part, the School Board may place the Contractor in default status and take any one of the following actions:
   a) Suspend activities under the Agreement, upon fifteen (15) days advance written notice by the School Board and withhold further payments, except for those necessary and proper costs which the Contractor cannot reasonably avoid during the period of suspension.
   b) Terminate the Agreement for cause, in whole or in part, upon fifteen (15) days advance written notice from the School Board.
   c) Terminate the Agreement for cause, in whole or in part, immediately effective upon notice, whenever the School Board determines that the Contractor has jeopardized the safety and welfare of the School Board or the public or whenever the fiscal integrity of the Agreement has been compromised.
   d) Invoke any other remedy or remedies that may be legally available.

13. EQUAL EMPLOYMENT OPPORTUNITY
Contractors awarded contracts involving Federal Funds in excess of $10,000 must be in compliance with Executive Order 11246 of September 24, 1965 entitled “Equal Employment Opportunity,” as amended by Executive Order 11375 of October 13, 1967, and as supplemented in Department of Labor Regulations (41 CFR Chapter 60).

14. CLEAN AIR ACT
Contractors awarded contracts in excess of $100,000 must be in compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15).

15. ACCESS TO RECORDS/FLORIDA’S PUBLIC RECORDS LAWS
This Agreement shall be subject to Florida’s Public Records Laws, Chapter 119, Florida Statutes. Contractor understands the broad nature of these laws and agrees to comply with Florida’s Public Records Laws and laws relating to records retention. The Contractor shall keep records to show its
compliance with program requirements. Contractors and subcontractors must make available, upon request of the School Board, a Federal grantor agency, the Comptroller General of the United States, or any of their duly authorized representatives, any books, documents, papers, and records of the Contractor which are directly pertinent to this specific Agreement for the purpose of making audit, examination, excerpts, and transcriptions. The Contractor shall retain all records for five (5) years after final payment is made or received and all pending matters are completed pursuant to Title 34, Sections 80.36(b)(1). Exempt or confidential information should not be disclosed unless authorized by law. Contractor shall destroy any duplicate records which are exempt from public records disclosure as set forth in Chapter 119. Upon termination of this agreement all public records in possession of the Contractor must be transferred to School Board at no cost. If records are stored electronically, the records must be provided in a compatible format to School Board’s operating system.

16. PATENTS, COPYRIGHTS AND ROYALTIES
All books, manuals, films or other materials suitable for copyright or patent, regardless of means of transmission, produced as a result of the work or services performed under or in connection with this Agreement, are hereby reserved as the exclusive property of and sole ownership by The School Board of Miami-Dade County, Florida, unless and to the extent that the parties agree otherwise, as evidenced in writing and included as a part of this Agreement. Contractor shall defend, indemnify and hold the School Board and its successors and assigns harmless from and against all third-party claims, suits and proceedings and any and all damages, liabilities, costs and expenses (including reasonable attorneys’ fees and court costs) incurred as a result of (i) infringement by Contractor of any third-party patent, copyright or trademark or (ii) misappropriation by Contractor of any third-party trade secret in connection with any of the foregoing. Contractor will indemnify and hold harmless the School Board from liability of any nature or kind, including costs and expenses for or on account of any copyrighted, service marked, trademarked, patented or unpatented invention, process, article or work manufactured or used in the performance of the Agreement, including its use by the School Board. If Contractor uses any design, device, materials or works covered by letters, service mark, trademark, patent, copyright or any other intellectual property right, it is mutually agreed and understood without exception that the proposal prices will include all royalties or costs arising from the use of such design, device or materials in any way involved in the work.

17. BACKGROUND SCREENING REQUIREMENTS
In accordance with the requirements of §1012.465, §1012.32 and §1012.467, Florida Statutes, and School Board Policies 8475, 1121.01, 3121.01 and 4121.01 as amended from time to time Contractor agrees that, if Contractor receives remuneration for services, Contractor and all of its employees who provide or may provide services under this Contract will complete criminal history checks, and all background screening requirements, including level 2 screening requirements as outlined in the above-referenced statutes and School Board Policies prior to providing services to The School Board of Miami-Dade County.

Additionally, Contractor agrees that each of its employees, representatives, agents, subcontractors or suppliers who is permitted access on school grounds when students are present, who has direct contact with students or who has access to or control of school funds must meet level 2 screening requirements as described in the above-referenced statutes and School Board Policies.

A non-instructional contractor who is exempt from the screening requirements set forth in §1012.465, §1012.468 or §1012.467, Florida Statutes, is subject to a search of his or her name or other identifying information against the registration information regarding sexual predators and sexual offenders maintained by the Department of Law Enforcement under §943.043 and the national sex offender public registry maintained by the United States Department of Justice.

Further, upon obtaining clearance by School Board, if School Board deems necessary, School Board will issue a photo identification badge, which shall be worn by the individual at all times while on School Board property when students are present.
Contractor agrees to bear any and all costs associated with acquiring the required background screening -- including any costs associated with fingerprinting and obtaining the required photo identification badge. Contractor agrees to require all its affected employees to sign a statement, as a condition of employment with Contractor in relation to performance under this Bid/RFP/Agreement, agreeing that the employee will abide by the heretofore described background screening requirements, and also agreeing that the employee will notify the Contractor/Employer of any arrest(s) or conviction(s) of any offense enumerated in School Board Policies 8475, 1121.01, 3121.01 and 4121.01 within 48 hours of its occurrence. Contractor agrees to provide the School Board with a list of all its employees who have completed background screening as required by the above-referenced statutes and who meet the statutory requirements contained therein. Contractor agrees that it has an ongoing duty to maintain and update these lists as new employees are hired and in the event that any previously screened employee fails to meet the statutory standards. Contractor further agrees to notify the School Board immediately upon becoming aware that one of its employees who was previously certified as completing the background check and meeting the statutory standards is subsequently arrested or convicted of any disqualifying offense. Failure by Contractor to notify the School Board of such arrest or conviction within 48 hours of being put on notice and within five (5) business days of the occurrence of qualifying arrest or conviction, shall constitute grounds for immediate termination of this Agreement.

The parties further agree that failure by Contractor to perform any of the duties described in this section shall constitute a material breach of the Agreement entitling the School Board to terminate this Agreement immediately with no further responsibility to make payment or perform any other duties under this Agreement.

18. COMPLIANCE WITH SCHOOL CODE
Contractor agrees to comply with all sections of the Florida K-20 Education Code, Title XLVIII Sections 1000-1013 Florida Statutes as it presently exists, as it may be amended from time to time. Further, Contractor agrees that failure to comply with the Florida K-20 Education Code shall constitute a material breach of this Agreement and may result in the termination of this Agreement by the School Board.

19. CONFLICT OF INTEREST
Former Miami-Dade County Public Schools employees, classified as Managerial Exempt Personnel, Pay Grade 22 and above, Miami-Dade County Schools Administrators Association, Pay Grade 47 and above, and other equivalent positions, are prohibited from personally representing another person or entity or acting as an agent or attorney for compensation in connection with any matter in which The School Board of Miami-Dade County, Florida, is interested, for a period of two (2) years following vacation of office. This provision is pursuant to School Board Policies 1129, 3129 and 4129 and §112.313(9) Florida Statutes.

20. COMPLIANCE WITH BOARD POLICIES
I certify agreement with the following School Board Policies: 6460 Business Code of Ethics; 6325 Cone of Silence; 6320 Purchasing; 6320.01 Outside Vendors Selling; and 6320.02 Minority/Women Business Enterprise Certification Procedures, and agree to comply with all applicable School Board contracting and procurement policies and procedures.

21. ASSIGNMENT
This Agreement may not be assigned nor may any assignment of monies due, or to become due to Contractor, be assigned without the prior written agreement of The School Board of Miami-Dade County, Florida. If Contractor attempts to make such an assignment, such attempt shall constitute a condition of default.

22. DEBARMENT
Pursuant to Board Policy 6320.04 – Contractor Debarment Procedures – Debarred contractors are excluded from conducting business with the School Board as agents, representative, partners, and associates of other contractors, subcontractors or individual sureties.
23. NO GRATUITY POLICY
It is the policy of Procurement Management Services not to accept gifts, gratuities, or favors of any kind or of any value whatsoever from vendors, members of the staffs, or families.

24. DAVIS-BACON ACT LABOR STANDARDS
The Contractor shall comply with all applicable provisions of 40 U.S.C. §276a to 276 a-7, the Davis-Bacon Act, as supplemented by the Department of Labor regulations (29 C.F.R. Part 5 "Labor Standards Provisions Applicable to Contracts Governing Federally Financed and Assisted Construction").

25. DISCLOSURE OF EMPLOYMENT OF CURRENT AND FORMER SCHOOL BOARD EMPLOYEES
Pursuant to School Board Policy 6460 Business Code of Ethics, which may be accessed at www.neola.com/miamidade-fl all bidders, proposers, consultants, vendors and contractors are required to disclose the names of any of their current and future employees who serve as agents, principals, subcontractors, employees, or consultants, to work on this agreement for the bidder, proposer, consultant, vendor, or contractor, and who are currently employed or have been employed by the School Board within the last two (2) years. Such disclosures will be in accordance with current School Board Policies, but will include, at a minimum, the names of former School Board employees, a list of the positions the employees held in the last two (2) years of their employment with the School Board, and the dates the employees held those positions. Written approval by the School Board for the use of current or former School Board employees (within the last two years) is mandatory prior to using funds obtain from this Agreement to subsidize the current or former School Board employees services.

<table>
<thead>
<tr>
<th>NAME</th>
<th>LIST OF POSITIONS</th>
<th>DATES EMPLOYEE HELD POSITION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

26. DISCLOSURE OF AFFILIATION WITH DISTRICT COMMITTEES, TASK FORCE, ASSOCIATIONS
Firms under Contract or proposing to enter into a Contract with Agency must be in conformance with the MDCPS Conflict of Interest policies available at www.dadeschools.net. Any vendor who submits a response to a solicitation must disclose the names of any of its company directors or officers who serve on any District Committees, Task Force or Associations.

Does the Firm or any Employee, Agent, or Associate of the Firm (Director’s, Officers, etc.) serve or have served within the past two (2) years on a Miami-Dade County Public Schools District Committee, Task Force, Association?

No ☐ Yes ☐ If answer is yes please complete the following:

<table>
<thead>
<tr>
<th>Name of Director(s) or Officer(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name</td>
</tr>
</tbody>
</table>
27. WRITTEN NOTICE DELIVERY
Any notice required or permitted to be given under this agreement by one party to the other party shall be in writing and shall be given and deemed to have been given immediately if delivered in person to the recipient’s address set forth in this section or on the date shown on the certificate of receipt if placed in the United States mail, postage prepaid, by registered or certified mail with return receipt requested, addressed to the receiving party at the address hereinafter specified.

**Contractor/Vendor Address.** The address for Contractor/Vendor for all purposes under this agreement and for all notices hereunder shall be:

Contractor/Vendor:

Contact’s Name/Title):

Address:

**School Board’s Address.** The address for the School Board for all purposes under this Agreement and for all notices hereunder shall be:

The School Board of Miami-Dade County, Florida

Attn: Alberto M. Carvalho, Superintendent

1450 N.E. Second Avenue, Suite 912

Miami, Florida 33132

With a copy to:

The School Board of Miami-Dade County, Florida

Department:

Department Director: Attention:

Address:

Miami-Dade County, Florida, its officers, directors and employees shall be named as additional insured. Prior to effective date of the Agreement, Contractor shall be responsible for providing the School Board with (1) certificate(s) of insurance and (2) policy endorsement(s) as proof of said coverage. If the Agreement is pursuant to a Request for Proposal or Invitation to Bid, then the Contractor shall also comply with insurance requirements set forth therein. Contractor shall maintain insurance coverage in effect for the entire term of the Agreement. Cancellation or modification of terms, without the prior written consent of the School Board, shall constitute a material default under the Agreement.
<table>
<thead>
<tr>
<th><strong>School Board Attorney</strong> - Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SUBMITTED BY:</strong></td>
<td></td>
</tr>
<tr>
<td>Charge Location Administrator Signature</td>
<td>Date</td>
</tr>
<tr>
<td>Regional Superintendent/Division Head Signature</td>
<td>Date</td>
</tr>
<tr>
<td>Office of Grants Administration Signature</td>
<td>Date</td>
</tr>
<tr>
<td><strong>NOTE:</strong> Signature of Assistant Superintendent for the Office of Intergovernmental Affairs and Grants Administration required ONLY for contracts financed from Contracted Programs Funds (Part IV).</td>
<td></td>
</tr>
<tr>
<td>Risk Management Signature</td>
<td>Date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>VENDOR/CONTRACTOR</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BY:</strong> Signature</td>
</tr>
<tr>
<td>Name: (Name Typed) (Title) (Date)</td>
</tr>
<tr>
<td>Address:</td>
</tr>
<tr>
<td>Social Security No. (if individual)</td>
</tr>
<tr>
<td>F.E.I.N. (If organization)</td>
</tr>
<tr>
<td>School Board Employee: Yes ☐ No ☐</td>
</tr>
<tr>
<td>M-DCPS Employee No.</td>
</tr>
</tbody>
</table>

*The Remainder of this Page was left Intentionally Blank.*
## SECTION 7.0 – ATTACHMENTS

<table>
<thead>
<tr>
<th>Exhibit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exhibit 1</td>
<td>Cover Page for Proposal</td>
</tr>
<tr>
<td>Exhibit 2</td>
<td>Affidavit Identifying Authorized Representative(s) for Selection Committee Proceedings (RFP Process)</td>
</tr>
<tr>
<td>Exhibit 3</td>
<td>Acknowledgment of Amendments</td>
</tr>
<tr>
<td>Exhibit 4</td>
<td>Local Business Affidavit of Eligibility</td>
</tr>
<tr>
<td>Exhibit 5</td>
<td>Florida Statutes on Public Entity Crimes</td>
</tr>
<tr>
<td>Exhibit 6</td>
<td>Vendor Experience</td>
</tr>
<tr>
<td>Exhibit 7</td>
<td>Anti-Collusion Statement</td>
</tr>
<tr>
<td>Exhibit 8</td>
<td>Disclosure of Employment of Former School Board Employees</td>
</tr>
</tbody>
</table>

*Balance of page intentionally left blank*
**PROPOSER’S NAME** (Name of firm, entity or organization):

**FEDERAL EMPLOYER IDENTIFICATION NUMBER:**

**NAME AND TITLE OF PROPOSER’S CONTACT PERSON:**

Name: 
Title: 

**MAILING ADDRESS:**

Street Address: 

City, State, Zip: 

**TELEPHONE:**  
( )  

**FAX:**  
( )  

**E-MAIL ADDRESS:**  

**PROPOSER’S ORGANIZATIONAL STRUCTURE:**

- Corporation  
- Partnership  
- Proprietorship  
- Joint Venture  
- Other (Explain): 

**IF CORPORATION,**

Date Incorporated/Organized: 

State Incorporated/Organized: 

States registered in as foreign corporation: 

**PROPOSER’S SERVICE OR BUSINESS ACTIVITIES OTHER THAN WHAT THIS SOLICITATION REQUESTS FOR:**

**LIST NAMES OF PROPOSER’S SUBCONTRACTORS OR SUBCONSULTANTS FOR THIS PROJECT:**

**PROPOSER’S AUTHORIZED SIGNATURE**

The undersigned hereby certifies that this proposal is submitted in response to this solicitation.

Signed By: ____________________________  Date: ____________________________

Print Name: ____________________________  Title: ____________________________
Exhibit 2
AFFIDAVIT IDENTIFYING AUTHORIZED REPRESENTATIVE(S)
FOR SELECTION COMMITTEE PROCEEDINGS (RFP PROCESS)

Firm/Proposer's Name: _______________________________________________________
Address: ___________________________________________________ Zip: ____________
Business Telephone: (_____) ____________________
This RFP No.: ____________________________________________________________

List all members of the Proposer's presentation team who may participate on your firm's behalf in Oral Presentations including negotiations under this RFP process:

<table>
<thead>
<tr>
<th>NAME</th>
<th>TITLE</th>
<th>EMPLOYED BY</th>
<th>TEL. NO.</th>
</tr>
</thead>
<tbody>
<tr>
<td>___________________</td>
<td>__________________________</td>
<td>____________</td>
<td>____________</td>
</tr>
<tr>
<td>___________________</td>
<td>__________________________</td>
<td>____________</td>
<td>____________</td>
</tr>
<tr>
<td>___________________</td>
<td>__________________________</td>
<td>____________</td>
<td>____________</td>
</tr>
</tbody>
</table>

(ATTACH ADDITIONAL SHEET IF NECESSARY)

The individuals listed above are authorized by this Firm/Proposer to appear as its representative during Oral Presentations including negotiations before a Miami-Dade County Public Schools' evaluation, selection, technical review or similar committee or subcommittee under the above-referenced RFP process.

For the sole purpose of said Oral Presentations including negotiations under this RFP process, the listed individuals shall not be required to pay any lobbyist registration fees.

Additional authorized representatives for Oral Presentations including negotiations under this RFP process shall be recognized upon submission, prior to the oral presentation, to the M-DCPS Buyer of another fully executed affidavit (this Exhibit 2).

Unless he or she has been listed here, no individual shall appear before any M-DCPS evaluation, selection, technical review or similar committee or subcommittee on County Commissioners and has paid all applicable fees as a registered lobbyist.

Other than for the purposes of this RFP process, individuals who wish to address the School Board or a committee or subcommittee concerning any action, decision or recommendation of District personnel must register with the Clerk of the School Board and pay all applicable fees as a registered lobbyist.

Signature of Authorized Representative of Firm/Proposer: ________________________________________
Name:  ____________________________________________________
Title:   _____________________________________________________

STATE OF _____________________
COUNTY OF ___________________

The foregoing instrument was acknowledged before me this ________________ ,

by ____________________________________________ , a ____________________________, who is personally

(Individual, Officer, Partner or Agent) (Sole Proprietor, Corporation or Partnership)

known to me or who has produced __________________________________________ as identification and who did/did not take an oath.

(Signature of person taking acknowledgement)

(Name of Acknowledger typed, printed or stamped)

(Title or Rank) (Serial Number, if any)
Exhibit 3
ACKNOWLEDGEMENT OF AMENDMENTS

Instructions: Complete Part I or Part II, whichever is applicable.

PART I: Listed below are the dates of issue for each Addendum received in connection with this solicitation.

Addendum #1, Dated ____________________________, 20__
Addendum #2, Dated ____________________________, 20__
Addendum #3, Dated ____________________________, 20__
Addendum #4, Dated ____________________________, 20__
Addendum #5, Dated ____________________________, 20__
Addendum #6, Dated ____________________________, 20__
Addendum #7, Dated ____________________________, 20__
Addendum #8, Dated ____________________________, 20__

PART II:
No Addendum was received in connection with this solicitation.

Authorized Signature:____________________________________  Date:  __________________
Print Name:  _________________________________________ Title:   ____________________
Federal Employer Identification Number:  ____________________________________________
Firm Name:  ___________________________________________________________________
Address:  _____________________________________________________________________
City/State/Zip:  _________________________________________________________________
Telephone:  _______________________________  Fax:  _______________________________
### Miami-Dade County Public Schools
Local Business Affidavit of Eligibility

*This declaration is executed under penalty of perjury of the laws of the United States and State of Florida.*

#### THIS AFFIDAVIT IS SUBMITTED IN REFERENCE TO THE FOLLOWING SOLICITATION:
RFQ/RFP/BID/CONTRACT/PROJECT # (as applicable):

<table>
<thead>
<tr>
<th>BUSINESS NAME:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTACT PERSON:</td>
<td></td>
</tr>
<tr>
<td>ADDRESS: (Include City, State &amp; Zip Code)</td>
<td></td>
</tr>
<tr>
<td>FEIN (Federal Employer Identification Number):</td>
<td></td>
</tr>
<tr>
<td>Length of Time at Address Provided:</td>
<td></td>
</tr>
<tr>
<td>Length of Time Located within the legal boundaries of Miami-Dade County:</td>
<td></td>
</tr>
<tr>
<td>BUSINESS STRUCTURE:</td>
<td>• Corporation</td>
</tr>
<tr>
<td>PHONE:</td>
<td>FAX: ( )</td>
</tr>
<tr>
<td>E-MAIL ADDRESS:</td>
<td></td>
</tr>
</tbody>
</table>

#### ATTESTATION - I understand that:
- In accordance with School Board Policy 6320.04, local business means the vendor has a valid business license, issued by a jurisdiction located in Miami-Dade County, with its headquarters, manufacturing facility, or locally-owned franchise located within the legal boundaries of Miami-Dade County, for at least twelve (12) months (or having a street address for at least twenty-four (24) months) prior to the bid or proposal opening date. Post office boxes are not verifiable and shall not be used for the purpose of establishing said physical address. Mark applicable box and attach support documentation to this affidavit of eligibility with a bid or proposal.
- To be considered for local preference, a vendor must attach a copy of its business license (Local Business Tax Receipt) to this affidavit of eligibility with a bid or proposal.
- The preference does not apply to goods or services exempted by statute as reflected in Policy 6320, or prohibited by Federal or State law, or other funding source restrictions.
- The application of local preference to a particular purchase, contract, or category of contracts for which the Board is awarding authority may be waived upon written justification and recommendation by the Superintendent.
- The preference established in this policy does not prohibit the right of the Board, or other authorized purchasing authority, from giving preference permitted by law in addition to the preference authorized in this policy.
- The preference established in this policy does not prohibit the right of the Board, or other authorized purchasing authority, to compare quality or fitness for use of supplies, materials, equipment and services proposed for purchase and compare qualifications, character, responsibility and fitness of all persons, firms or corporations submitting bids or proposals.
- The above information may be subject to verification.
- A vendor who misrepresents the local preference status of its firm in a proposal or bid submitted to the School Board will lose the privilege to claim local preference status, and shall lose eligibility to claim local preference status for a period of one (1) year. The Superintendent may also recommend that the firm be referred for debarment in accordance with Policy 6320.04.

BEFORE ME, the undersigned authority, in and for the State of Florida and Miami-Dade County personally appeared

[Signature]

who, after being sworn according to law, stated that he or she was authorized to represent [Business Name] and to execute this affidavit on behalf of the said Business Entity and attests, under penalty of perjury, to the above.

SWORN AND SUBSCRIBED BEFORE ME

SIGNATURE OF NOTARY PUBLIC

THIS ______ DAY OF ____________, 20____

My Commission Expires: ________________

NOTARY SEAL

PRINTED NAME OF AFFIANT

SIGNATURE OF AFFIANT

DATE

TITLE

COMPANY NAME

FM 7138 Rev. (03-10)
The State of Florida has enacted a law that requires bidders or contractors to submit a sworn document stating whether or not a corporation, its officers, predecessors or successors have been convicted of a public entity crime. Neither the Proposer, the contractor nor any officer, director, executive, partner, shareholder, employee, member nor agent who is active in the management of the Proposer or contractor nor any affiliate of the Proposer or contractor shall have been convicted of a public entity crime subsequent to July 1, 1989.

All Proposers must read and complete in its entirety, sign and have notarized the attached “Sworn Statement under Section 287.133 (3) (a), Florida Statutes, on Public Entity Crimes.”

Failure to do so will result in the proposal submitted being considered non-responsive and therefore not considered for award.

Bid or Contract No.___________________________________

SWORN STATEMENT UNDER SECTION 287.133 (3) (A), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

STATE OF________________________________________
COUNTY OF______________________________

Before me, the undersigned authority, personally appeared _____________________ who, being by me first duly sworn, made the following statement:

1. The business addresses of _____________________ (name of bidder or contractor) is_________________________________________________.

2. My relationship to ______________________ (name of bidder or contractor) is __________________________(relationship such as sole proprietor, partner, president, vice president).

3. I understand that a public entity as defined in Section 287.133 of the Florida Statutes includes a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity in Florida or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or such an agency or political subdivision and involving antitrust, fraud, theft, bribery, collusion, racketeering conspiracy, or material misrepresentation.

4. I understand that “convicted” or “conviction” is defined by the statute to mean a finding or a conviction of a public entity crime with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry plea of guilty or nolo contender.
5. I understand that “affiliate” is defined by the statute to mean (1) a predecessor or successor of a person or a corporation convicted of a public entity crime, or (2) an entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime, or (3) those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate, or (4) a person or corporation who knowingly entered into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months.

6. Neither the Proposer, contractor nor any officer, director, executive, partner, shareholder, employee, member nor agent who is active in the management of the Proposer or contractor nor any affiliate of the Proposer or contractor has been convicted of a public entity crime.

   (Draw a line through paragraph 6 if paragraph 7 below applies)

7. There has been a conviction of a public entity crime by the Proposer or contractor, or an officer, director, executive, partner, shareholder, employee, member or agent of the Proposer or contractor, or an officer, director, executive, partner, shareholder, employee, member or agent of the Proposer or contractor who is active in the management of the Proposer or contractor or an affiliate of the Proposer or contractor. A determination has been made pursuant to Section 287.133 (3) by order of the Division of Administrative Hearings that it is not in the public interest for the name of the convicted person or affiliate to appear on the convicted Proposer list. The name of the convicted person or affiliate is____________________________. A copy of the order of the Division of Administrative Hearing is attached to this statement.

________________________________________________________________________
Affiant’s Signature

Sworn to and subscribed before me in the state and county first mentioned above on the __________ day of ____________, 20____.

NOTARY PUBLIC

MY COMMISSION EXPIRES
Submit one form for each client reference. Understand that each client may be contacted to verify the validity of the partnership between the Proposer / Sub Proposer and the client.

Prime Proposer/Sub Proposer:

_____________________________________________________________________

Client Name:

_____________________________________________________________________

Address:

_____________________________________________________________________

Client Contact name:

_____________________________________________________________________

Title:

_____________________________________________________________________

Phone number:

_____________________________________________________________________

Email:

_____________________________________________________________________

Is Client a School District? (Yes___ No ___)

Duration of Client Relationship:
Date Started: _____________ Date Ended: _____________ for __________ Total Years.

Additional information (attach pages as necessary):

Describe the services provided; provide total value of the contract, result of the project and Proposers role in the project, difficulties experienced during implementation or ongoing operations. If contract was terminated, state the reason for termination.
Exhibit 7
ANTI-COLLUSION STATEMENT

THE UNDERSIGNED PROPOSER HAS NOT DIVULGED TO, DISCUSSED, OR COMPARED HIS/HER PROPOSAL WITH OTHER PROPOSERS AND HAS NOT COLLUDED WITH ANY OTHER PROPOSER OR PARTIES TO THE PROPOSAL WHATSOEVER. PROPOSER ACKNOWLEDGES THAT ALL INFORMATION CONTAINED HEREIN IS PART OF THE PUBLIC DOMAIN AS DEFINED BY THE STATE OF FLORIDA SUNSHINE LAW.

CERTIFICATION AND IDENTIFICATION FOR PROPOSERS SUBMITTING PROPOSALS

I certify that this proposal is made without prior understanding, agreement or connection with any corporation, firm or person submitting a proposal for the same service, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of these proposal specifications and I certify that I am authorized to sign this proposal. I certify agreement with the School Board of Miami-Dade County, Florida Business Code of Ethics and agree to comply with this Code and all applicable School Board contracting and procurement policies and procedures (School Board Policy 6460). I certify that I, nor my company or its principals, or any wholly-owned subsidiary are currently debarred or in default of any bid, purchase order or contract with the School Board or any other private or governmental entity and that the company satisfies all necessary requirements as an entity to do business with The School Board of Miami-Dade County, Florida.

Type of Business Organization and Authority of Signatory:

Indicate type of business organization Proposer does business. For example, Partnership, Limited Partnership, Limited Liability Company, Corporation, etc. If a proposal is submitted by a corporation, provide documentation that the corporation is active and authorized to do business in the State of Florida, and that its corporate status shall remain active and unchanged at the time of award of proposal. As to other types of business organizations, please provide any and all documentation relating thereto, including without limitation, verification that the party signing this proposal is fully authorized and empowered to do so, on behalf of Proposer. In addition, set forth name(s) and title of any and all parties who are authorized to contract on behalf of Proposer.

LEGAL NAME OF AGENCY OR PROPOSER SUBMITTING PROPOSAL: _______________________________
MAILING ADDRESS: _________________________________________________________________
CITY STATE, ZIP CODE: _____________________________________________________________
TELEPHONE NUMBER: ______________________________________________________________
TYPE OF BUSINESS ORGANIZATION: _________________________________________________
E-MAIL ADDRESS: _________________________________________________________________
BY: SIGNATURE (ORIGINAL) _______________________________________________________
BY: NAME TYPED_________________________________________________________________
TITLE: ___________________________________________________________________________
Exhibit 8

DISCLOSURE OF EMPLOYMENT OF FORMER SCHOOL BOARD EMPLOYEES

Pursuant to School Board Policy 6460, which may be accessed at http://www2.dadeschools.net/schoolboard/rules, all bidders, proposers, and consultants are required to disclose the names of any of their employees who serve as agents or principals for the bidder, proposer or consultant, and who, within the last two years, have been or are employees of the School Board. Such disclosure will be in accordance with current School Board rules, but will include, at a minimum, the name of the former School Board employee, a list of the positions the employee held in the last of their employment with the School Board, and the dates the employees held those positions. See following page and include page in your proposal packages. If non-applicable, please indicate so on the form and return.

DISCLOSURE OF CONFLICT OF INTEREST (Affiliation with District Committees, Task Force or Associations)

Proposers are required to disclose the names of any officers/directors, who serve on any district committees, task force, or associations. See following page and include page in your proposal packages. If non-applicable, please indicate so on the form and return.

DISCLOSURE OF EMPLOYMENT OF FORMER SCHOOL BOARD EMPLOYEES
(PLEASE INCLUDE THIS FORM WITH YOUR PROPOSAL PACKAGE)

Pursuant to School Board Policy 6460, which may be accessed on the school website at www2.dadeschools.net/schoolboard/rules all bidders, proposers, and consultants, are required to disclose the names of any of their employees who serve as agents or principals for the bidders, proposers or consultant, and who within the last two years, have been or are employees of the School Board. Such disclosure will be in accordance with current School Board rules, but will include, at a minimum, the name of the former School Board employee, a list of the positions the employee held in the last two years of his or her employment with the School Board, and the dates the employee held those positions.

<table>
<thead>
<tr>
<th>NAME</th>
<th>LIST OF POSITIONS</th>
<th>DATES EMPLOYEE HELD POSITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>_______</td>
<td>_________________</td>
<td>___________________________</td>
</tr>
<tr>
<td>_______</td>
<td>_________________</td>
<td>___________________________</td>
</tr>
<tr>
<td>_______</td>
<td>_________________</td>
<td>___________________________</td>
</tr>
</tbody>
</table>
**DISCLOSURE OF CONFLICT OF INTEREST**  
**(AFFILIATION WITH DISTRICT COMMITTEES, TASK FORCE, ASSOCIATIONS)**

Firms under Contract or proposing to enter into a Contract with Agency must be in conformance with the M-DCPS Conflict of Interest policies available at [www.dadeschools.net](http://www.dadeschools.net). Any vendor who submits a response to a solicitation must disclose the names of any of its company directors or officers who serve on any District Committees, Task Force or Associations. Does the Firm or any Associate of the Firm (Director’s, Officers, etc.) serve or have served within the past two years (2) on a Miami-Dade County Public Schools District Committee, Task Force, or Association?

No ☐  Yes ☐  

If answer is yes, please complete the following:

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Current Title with Firm</th>
<th>Name of M-DCPS Committee, Task Force, Association Served</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:___________</td>
<td></td>
<td></td>
</tr>
<tr>
<td>•</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name:___________</td>
<td></td>
<td></td>
</tr>
<tr>
<td>•</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NOTE: THIS FORM SHALL BE RETURNED WITH THE PROPOSAL SUBMITTAL