



Solicitation #: RFP 2310

Bid Opening/Location: 3231 Old Furnace Road – Chesnee, SC  
29323, February 16<sup>th</sup>, 2023 at 9:00am

## Request for Proposals

Description: Financial and Procurement Audit Services

Issue Date: January 6<sup>th</sup>, 2023

Bids Due: February 16<sup>th</sup>, 2023 9:00am

Submit questions to: Matt Pettit– [Matthew.Pettit@spart2.org](mailto:Matthew.Pettit@spart2.org)  
**QUESTIONS MUST BE RECEIVED BY: February 15<sup>th</sup>, 2023 12:00PM**

**Mail/Hand Carry Bid To -** Spartanburg School District Two  
 (No Electronic/Facsimile Submissions) Attn: Matt Pettit  
 3231 Old Furnace Road  
 Chesnee, SC 29323

**NUMBER OF COPIES TO BE SUBMITTED: One (1) Original, One (1) Copy**

**\*\*\*Solicitation Number and Opening Date must be shown on sealed envelope\*\*\***

The award, this solicitation, any amendments, and any related notices will be posted on our website -  
<http://www.spart2.org/departments/finance/procurement/>

### Must Be Signed to be Valid

Authorized Signature		Printed Name/Title		Date	
Company Name			State Vendor No. (If Known)		
Mailing Address			Social Security or Federal Tax No.		
City		State		Zip	
Phone Number	Fax Number	Email Address			
Buyer Signature and Date (District Use Only)				Purchase Order Number (District Use Only)	

SC Certified Minority Vendor? Yes or No (circle one)

**ACKNOWLEDGEMENT OF AMENDMENTS: Acknowledge receipt of amendments by initialing below.**

Amendment No.	Amendment No.	Amendment No.	Amendment No.	Amendment No.	Amendment No.	Amendment No.
1	2	3	4	5	6	7
Initial	Initial	Initial	Initial	Initial	Initial	Initial

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**I. SCOPE OF SOLICITATION**

Spartanburg School District Two (hereinafter, “the District”) invites all qualified providers to submit sealed proposals for District Two’s Financial and Procurement Audit Services, complying with the enclosed description and/or specifications and conditions for this solicitation.

Spartanburg County School District 2 is located in the northwestern part of Spartanburg County, and includes the Town of Chesnee and the communities of Boiling Springs, Fingerville, and Mayo. A small portion of the District is located in Cherokee County. The District encompasses a land area of approximately 134 square miles. The District is made up of 2 high schools, 3 middle schools, 1 intermediate school, and 8 elementary schools. The District currently has an annual budget of over \$104 million, and over 11,000 students including pre-K, and employs approximately 1,250 employees.

**II. INSTRUCTIONS TO OFFERORS**

**A. GENERAL INSTRUCTIONS TO OFFERORS**

**DEFINITIONS** - Except as otherwise provided herein, the following definitions are applicable to all parts of the solicitation:

AMENDMENT means a document issued to supplement the original solicitation document.

BOARD means the Spartanburg School District Two Board of Trustees

BUYER means the Procurement Officer.

CHANGE ORDER means any written alteration in specifications, delivery point, rate of delivery, period of performance, price, quantity, or other provisions of any contract accomplished by mutual agreement of the parties to the contract.

CONTRACT See clause entitled Contract Documents & Order of Precedence.

CONTRACT MODIFICATION means a written order signed by the Procurement Officer, directing the contractor to make changes which the changes clause of the contract authorizes the Procurement Officer to order without the consent of the contractor.

CONTRACTOR means the Offeror receiving an award as a result of this solicitation.

COVER PAGE means the top page of the original solicitation on which the solicitation is identified by number. Offerors are cautioned that Amendments may modify information provided on the Cover Page.

OFFER means the bid or proposal submitted in response this solicitation. The terms Bid and Proposal are used interchangeably with the term Offer.

OFFEROR means the single legal entity submitting the offer. The term Bidder is used interchangeably with the term Offeror. See bidding provisions entitled Signing Your Offer and Bid/Proposal As Offer To Contract.

PROCUREMENT OFFICER means the person, or his successor, identified as such on the Cover Page.

RESPONSIBLE Bidder means a person who has the capability in all respects to perform fully the contract requirements, and the integrity and reliability, which will assure good faith performance, which may be substantiated by past performance

RESPONSIVE Bidder means a person who has submitted a bid or offer, which conforms in all material aspects to the invitation for bids or request for proposals.

SOLICITATION means this document, including all its parts, attachments, and any Amendments.

SUBCONTRACTOR means any person having a contract to perform work or render service to Contractor as a part of the Contractor's agreement arising from this solicitation.

WORK means all labor, materials, equipment and services provided or to be provided by the Contractor to fulfill the Contractor's obligations under the Contract

YOU and YOUR means Offeror.

**AMENDMENTS TO SOLICITATION:** (a) The Solicitation may be amended at any time prior to opening. All actual and

prospective Offerors (b) shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by letter, or (3) by submitting a bid that indicates in some way that the bidder received the amendment. (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

**AWARD NOTIFICATION:** Notice regarding the District's intent to award a contract will be posted on the District Website – <https://www.spart2.org/departments/finance/procurement>. If the contract resulting from this Solicitation has a total or potential value in excess of fifty thousand dollars, such notice will be sent to all Offerors responding to the Solicitation and any award will be effective the day such notice is given. Should the contract resulting from this Solicitation have a total or potential value of one hundred thousand dollars or more, such notice will be sent to all Offerors responding to the Solicitation and any award will not be effective until the eleventh day after such notice is given.

**BID / PROPOSAL AS OFFER TO CONTRACT:** By submitting Your Bid or Proposal, You are offering to enter into a contract with Spartanburg School District Two. Without further action by either party, a binding contract shall result upon final award. Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror on the Cover Page. An Offer may be submitted by only one legal entity; "joint bids" are not allowed.

**BID ACCEPTANCE PERIOD:** In order to withdraw Your Offer after the minimum period specified on the Cover Page, You must notify the Procurement Officer in writing

**BID IN ENGLISH & DOLLARS:** Offers submitted in response to this solicitation shall be in the English language and in US dollars, unless otherwise permitted by the Solicitation.

**CERTIFICATION REGARDING DEBARMENT AND OTHER RESPONSIBILITY MATTERS:** By submitting an Offer, Offeror certifies, to the best of its knowledge and belief, that-

(a)(i) Offeror and/or any of its principals:

- (A) Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any state or federal agency;
- (B) Have not, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and
- (C) Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(i)(B) of this provision.

(ii) Offeror has not, within a three-year period preceding this offer, had one or more contracts terminated for default by any public (Federal, state, or local) entity.

(2) "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions).

(b) Offeror shall provide immediate written notice to the Procurement Officer if, at any time prior to contract award, Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

(c) If Offeror is unable to certify the representations stated in paragraphs (a)(i), Offer must submit a written explanation regarding its inability to make the certification. The certification will be considered in connection with a review of the Offeror's responsibility. Failure of the Offeror to furnish additional information as requested by the Procurement Officer may render the Offeror non-responsive.

(d) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

(e) The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly or in bad faith rendered an erroneous certification, in addition to other remedies available to the State, the Procurement Officer may terminate the contract resulting from this solicitation for default.

**CODE OF LAWS AVAILABLE:** The South Carolina Code of Laws, including the Consolidated Procurement Code, is available at <http://www.scstatehouse.net/code/statmast.htm>. The South Carolina Regulations are available at: <http://www.scstatehouse.net/coderegs/statmast.htm>.

**COMPLETION OF FORMS / CORRECTION OF ERRORS:** All prices and notations should be printed in ink or typewritten. Errors should be crossed out, corrections entered and initialed by the person signing the bid. **Do not modify the solicitation document itself (including bid schedule).**

**DEADLINE FOR SUBMISSION OF OFFER:** Any offer received after the Procurement Officer or his/her designee has declared that the time set for opening has arrived, shall be rejected, unless the offer has been delivered to the designated procurement office or the District's mail room, where confirmation can be authenticated by a third party method, prior to bid opening

**DISTRICT CLOSINGS:** If an emergency or unanticipated event interrupts normal District processes so that offers cannot be received at the Procurement Office designated for receipt of bids by the exact time specified in the solicitation, the time specified for receipt of offers will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which the District processes resume. In lieu of an automatic extension, an Amendment may be issued to reschedule bid opening. If District offices are closed at the time a pre-bid or pre-proposal conference is scheduled, an Amendment will be issued to reschedule the conference.

**DISTRICT REGULATIONS:** The bidder(s) and his representatives shall follow all applicable regulations while on District property, including the NO SMOKING, no weapons, and drug-free policies. No work shall interfere with school activities or environments unless an authorized employee for that location gives permission. All representatives of winning bidder must display identification tags (picture ID) at all times while on school grounds.

**DRUG FREE WORK PLACE CERTIFICATION:** By submitting an Offer, Contractor certifies that, if awarded a contract, Contractor will comply with all applicable provisions of The Drug-free Workplace Act, Title 44, Chapter 107 of the South Carolina Code of Laws, as amended.

**DUTY TO INQUIRE:** Offeror, by submitting an Offer, represents that it has read and understands the Solicitation and that its Offer is made in compliance with the Solicitation. Offerors are expected to examine the Solicitation thoroughly and should request an explanation of any ambiguities, discrepancies, errors, omissions, or conflicting statements in the Solicitation. Failure to do so will be at the Offeror's risk. Offeror assumes responsibility for any patent ambiguity in the Solicitation that Offeror does not bring to the District's attention.

**ETHICS CERTIFICATE:** By submitting an offer, the offeror certifies that the offeror has and will comply with, and has not, and will not, induce a person to violate Title 8, Chapter 13 of the South Carolina Code of Laws, as amended (ethics act). The following statutes require special attention: Section 8-13-700, regarding use of official position for financial gain; Section 8-13-705, regarding gifts to influence action of public official; Section 8-13-720, regarding offering money for advice or assistance of public official; Sections 8-13-755 and 8-13-760, regarding restrictions on employment by former public official; Section 8-13-775, prohibiting public official with economic interests from acting on contracts; Section 8-13-790, regarding recovery of kickbacks; Section 8-13-1150, regarding statements to be filed by consultants; and Section 8-13-1342, regarding restrictions on contributions by contractor to candidate who participated in awarding of contract. The District may rescind any contract and recover all amounts expended as a result of any action taken in violation of this provision. If contractor participates, directly or indirectly, in the evaluation or award of public contracts, including without limitation, change orders or task orders regarding a public contract, contractor shall, if required by law to file such a statement, provide the statement required by Section 8-13-1150 to the procurement officer at the same time the law requires the statement to be filed.

**PROCUREMENT AUTHORITY:** (a) All authority regarding the conduct of this procurement is vested solely with the responsible Procurement Officer. Unless specifically delegated in writing, the Procurement Officer is the only government official authorized to bind the government with regard to this procurement. (b) Purchasing Liability. The Procurement Officer is an employee of the Spartanburg School District Two acting on behalf of the District pursuant to their Procurement Code. Any contracts awarded as a result of this procurement are between the Contractor and the Spartanburg School District Two.

**PROCUREMENT CODE AVAILABLE:** The Spartanburg School District Two's Procurement Code, is available at <https://www.spart2.org/departments/finance/procurement>.

**PROTESTS:** (a) Solicitation - Any prospective bidder, offeror, contractor, or subcontractor who is aggrieved in connection with the solicitation of a contract shall protest within fifteen (15) days of the date of issuance of the applicable solicitation document at issue. (b) Intent to Award - Any actual bidder, offeror, contractor, or subcontractor who is aggrieved in connection with the intended award or award of a contract shall protest within ten (10) days of the date notification of award is posted in accordance with this code. A protest shall be in writing, submitted to the appropriate Chief Procurement Officer, and shall set forth the grounds of the protest and the relief requested with enough particularity to give notice of the issues to be decided. [§ 11-35-4210]

**PROTEST- ADDRESS:** Any protest must be submitted in writing to the Chief Finance Officer, Brandi Gist, 3231 Old Furnace Rd, Chesnee, SC 29323, or to [brandi.gist@spart2.org](mailto:brandi.gist@spart2.org)

**PUBLIC OPENING:** Offers will be publicly opened at the date / time and at the location identified on the Cover Page, or last Amendment, whichever is applicable.

**QUESTIONS FROM OFFERORS:** (a) Any prospective offeror desiring an explanation or interpretation of the solicitation, drawings, specifications, etc., must request it in writing, either by mail or electronic communication (e-mail). Questions must be received by the Procurement Officer no later than the end of business (4:30 PM, EST) of the submission date stated on the Cover Page. Label any communication regarding your questions with the name of the Procurement Officer, and the solicitation's title and number. Oral explanations or instructions will not be binding. Any information given a prospective offeror concerning a solicitation will be furnished promptly to all other prospective offerors as an Amendment to the solicitation, if that information is necessary for submitting offers or if the lack of it would be prejudicial to other prospective offerors. (b) The District seeks to permit maximum practicable competition. Offerors are urged to advise the Procurement Officer - as soon as possible - regarding any aspect of this procurement, including any aspect of the Solicitation, which unnecessarily or inappropriately limits full and open competition.

**REJECTION/CANCELLATION:** The District may cancel this solicitation in whole or in part. The District may reject any or all proposals in whole or in part.

**RESPONSIVENESS/IMPROPER OFFERS:**

- a. Bid as Specified. Offers for supplies or services other than those specified will not be considered unless authorized by the Solicitation.
- b. Responsiveness. Any Offer which fails to conform to the material requirements of the Solicitation may be rejected as nonresponsive. Offers which impose conditions that modify material requirements of the Solicitation may be rejected. If a fixed price is required, an Offer will be rejected if the total possible cost to the District cannot be determined. Offerors will not be given an opportunity to correct any material nonconformity. Any deficiency resulting from a minor informality may be cured or waived at the sole discretion of the Procurement Officer. [R.19-445.2070 and Section 11-35-1520(13)]
- c. Price Reasonableness: Any offer may be rejected if the Procurement Officer determines in writing that it is unreasonable as to price. [R. 19-445.2070].
- d. Unbalanced Bidding. The District may reject an Offer as nonresponsive if the prices bid are materially unbalanced between line items or sub-line items. A bid is materially unbalanced when it is based on prices significantly less than cost for some work and prices which are significantly overstated in relation to cost for other work, and if there is a reasonable doubt that the bid will result in the lowest overall cost to the District even though it may be the low evaluated bid, or if it is so unbalanced as to be tantamount to allowing an advance payment.

**RESTRICTIONS APPLICABLE TO OFFERORS:** Violation of these restrictions may result in disqualification of your offer, suspension or debarment, and may constitute a violation of the state Ethics Act. (a) After issuance of the solicitation, all communications must be solely with the Procurement Officer. You agree not to discuss this procurement activity in any way with any other District employees, agents or officials. This restriction may be lifted by express written permission from the Procurement Officer. This restriction expires once a contract has been formed. (b) Unless otherwise approved in writing by the Procurement Officer, you agree not to give anything to any other District employees, agents or officials prior to award.

**SIGNING YOUR OFFER:** Every Offer must be signed by the individual with actual authority to bind the Offeror. (a) If the Offeror is an individual, the Offer must be signed by that individual. If the Offeror is an individual doing business as a firm, the Offer must be submitted in the firm name, signed by the individual, and state that the individual is doing business as a firm. (b) If the Offeror is a partnership, the Offer must be submitted in the partnership name, followed by the words "by its Partner," and signed by a general partner. (c) If the Offeror is a corporation, the Offer must be submitted in the corporate name, followed by the signature and title of the person authorized to sign. (d) An Offer may be submitted by a joint venture involving any combination of individuals, partnerships, or corporations. If the Offeror is a joint venture, the Offer must be submitted in the name of the Joint Venture and signed by every participant in the joint venture in the manner prescribed in paragraphs (a) through (c) above for each type of participant. (e) If an Offer is signed by an agent, other than as stated in subparagraphs (a) through (d) above, the Offer must state that it has been signed by an Agent. Upon request, Offeror must provide proof of the agent's authorization to bind the principal.

**SUBMITTING CONFIDENTIAL INFORMATION:** For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the word "CONFIDENTIAL" every page, or portion thereof, that Offeror contends contains information that is exempt from public disclosure because it is either (a) a trade secret as defined in Section 30-4-40(a)(1), or (b) privileged and confidential, as that phrase is used in Section 11-35-410. For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the words "TRADE SECRET" every page, or portion thereof, that Offeror contends contains a trade secret as that term is defined by Section 39-8-20 of the Trade Secrets Act. For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the word "PROTECTED" every page, or portion thereof, that Offeror contends is protected by Section 11-35-1810. All markings must be conspicuous; use color, bold, underlining, or some other method in order to conspicuously distinguish the mark from the other text. Do not mark your entire response (bid, proposal, quote, etc.) as confidential, trade secret, or protected. If your response or any part thereof, is improperly marked as confidential or trade secret or protected, the District may, in its sole discretion, determine it nonresponsive. If

only portions of a page are subject to some protection, do not mark the entire page.

By submitting a response to this solicitation or request, Offeror (1) agrees to the public disclosure of every page of every document regarding this solicitation or request that was submitted at any time prior to entering into a contract (including, but not limited to, documents contained in a response, documents submitted to clarify a response, and documents submitted during negotiations), unless the page is conspicuously marked "TRADE SECRET" or "CONFIDENTIAL" or "PROTECTED", (2) agrees that any information not marked, as required by these bidding instructions, as a "Trade Secret" is not a trade secret as defined by the Trade Secrets Act, and (3) agrees that, notwithstanding any claims or markings otherwise, any prices, commissions, discounts, or other financial figures used to determine the award, as well as the final contract amount, are subject to public disclosure. In determining whether to release documents, the District will detrimentally rely on Offeror's marking of documents, as required by these bidding instructions, as being either "Confidential" or "Trade Secret" or "PROTECTED". By submitting a response, Offeror agrees to defend, indemnify and hold harmless Spartanburg School District Two, its officers and employees, from every claim, demand, loss, expense, cost, damage or injury, including attorney's fees, arising out of or resulting from the District withholding information that Offeror marked as "confidential" or "trade secret" or "PROTECTED". (All references to S.C. Code of Laws.)

**SUBMITTING YOUR OFFER OR MODIFICATION:** (a) Offers and offer modifications shall be submitted in sealed envelopes or packages (unless submitted by electronic means) - (1) Addressed to the office specified in the Solicitation; and (2) Showing the time and date specified for opening, the solicitation number, and the name and address of the bidder. (b) If you are responding to more than one solicitation, each offer must be submitted in a different envelope or package. (c) Each Offeror must submit the number of copies indicated on the Cover Page. (d) Offerors using commercial carrier services shall ensure that the Offer is addressed and marked on the outermost envelope or wrapper as prescribed in paragraphs (a)(1) and (2) of this provision when delivered to the office specified in the Solicitation. (e) Facsimile or e-mail offers, modifications, or withdrawals, will not be considered unless authorized by the Solicitation. (f) Offers submitted by electronic commerce shall be considered only if the electronic commerce method was specifically stipulated or permitted by the solicitation. (g) It is the Offeror's responsibility to ensure that bids submitted by electronic commerce were received by the Procurement Officer.

**TAX CREDIT FOR SUBCONTRACTING WITH MINORITY FIRMS:** Pursuant to Section 12-6-3350, taxpayers, who utilize certified minority subcontractors, may take a tax credit equal to 4% of the payments they make to said subcontractors. The payments claimed must be based on work performed directly for a South Carolina state contract. The credit is capped at \$25,000 per year or the total tax liability; whichever is lesser. The taxpayer is eligible to claim the credit for 6 consecutive taxable years beginning with the taxable year in which the credit is first claimed. There is no carry forward of unused credits. The credit may be claimed on Form TC- 2, "Minority Business Credit." A copy of the subcontractor's certificate from the Governor's Office of Small and Minority Business (OSMBA) is to be attached to the contractor's income tax return. Taxpayers must maintain evidence of work performed for a State contract by the minority subcontractor. Questions regarding the tax credit and how to file are to be referred to: SC Department of Revenue, Research and Review, Phone: (803) 898-5786, Fax: (803) 898-5888. The subcontractor must be certified as to the criteria of a "Minority Firm" by the Governor's Office of Small and Minority Business Assistance (OSMBA). Certificates are issued to subcontractors upon successful completion of the certification process. Questions regarding subcontractor certification are to be referred to: Governor's Office of Small and Minority Business Assistance, Phone: (803) 734-0657, Fax: (803) 734-2498. Reference: SC §11-35-5010 - Definition for Minority Subcontractor & SC §11-35-5230 (B) - Regulations for Negotiating with State Minority Firms.

**UNIT PRICE:** Unit price must be shown for each item. In determining award, unit prices will govern over extended prices unless otherwise stated.

**WITHDRAWAL OR CORRECTION OF OFFER:** Offers may be withdrawn by written notice received at any time before the exact time set for opening. If the Solicitation authorizes facsimile offers, offers may be withdrawn via facsimile received at any time before the exact time set for opening. A bid may be withdrawn in person by a bidder or its authorized representative if, before the exact time set for opening, the identity of the person requesting withdrawal is established and the person signs a receipt for the bid. The withdrawal and correction of Offers is governed by the District's Procurement Code Article 5 Section 1520.7.1.

**B. SPECIAL INSTRUCTIONS TO OFFERORS**

**PRE-BID CONFERENCE:** No Pre-bid meeting is required for this solicitation.

This contract will be awarded for 3 years with an option for Spartanburg School District Two to choose to renew for two (2) additional one-year renewal periods (voluntary extensions). Pricing for the optional two (2) additional one-year renewal periods will be increased up to the current year's Consumer Price Index (CPI) percentage.

Proposals will be evaluated by a review committee based on the following: Proposals will be evaluated on the basis of the following evaluation criteria. The award will be made to the vendor whose proposal is determined by the evaluator(s) composite score to be most beneficial to the District. All proposals will be reviewed for purposes of determining responsiveness and responsibility. Any proposal that does not meet the essential requirements of the District will be subject to disqualification. For purposes of responsibility, all information given by the proposer concerning its availability and capability to perform fully the contract requirements and the integrity and reliability of the proposer will be reviewed. The submission of a proposal for review does not necessarily qualify the proposer or proposal as being responsive or responsible. Failure to provide specific information, as requested, for use in our evaluation will cause your proposal to be disregarded.

If necessary, the highest-ranking offerors' may be asked to give presentations to the evaluation team. Upon completion of the demonstrations, Offerors' responses may be re-evaluated based on any clarifications of the solution being offered to the District for a final evaluation.

**CLARIFICATION:** Pursuant to Section 11-35-1520(8), the Procurement Officer may elect to communicate with you after opening for the purpose of clarifying either your offer or the requirements of this solicitation. Such communications may be conducted only with offerors who have submitted an offer which obviously conforms in all material aspects to the solicitation. Clarification of an offer must be documented in writing and included with the offer. Clarifications may not be used to revise an offer or the solicitation.

### III. SCOPE OF WORK

It is the intent of Spartanburg School District Two (hereinafter referred to as the "District") to solicit proposals for Financial and Procurement Audit Services.

**The Proposal is divided into two parts. Scope 1 references the requirements for the financial audit. Scope 2 references the requirement for the procurement audit. The two will be reviewed and evaluated together to make the best decisions on behalf of the School District. The District reserves the right to select different audit firms for each type of audit depending on the evaluation of the proposals as well as cancel the solicitation in its entirety.**

#### Scope 1: Financial Audit Services

##### A. General Requirements

1. The District requires an audit of its total financial program. Audited revenues (excluding transfers) for all funds for 2021-2022 were as follows:

<b>Fund</b>	<b>Amount</b>
General Fund	97,702,718
Special Revenue-Special Projects	20,457,949
Special Revenue-EIA	6,599,985
Special Revenue-Food Services	8,381,712
Debt Service	15,800,086
Capital Projects	10,068
Proprietary Funds	0
Total	\$148,952,518

\*The Pupil Activity Fund is currently decentralized, with accounts held at each school. The District also maintains the Food Service Fund as a Special Revenue Fund.

2. The audit engagement requires the independent auditor to express an opinion on the general-purpose financial statements, report on compliance and internal controls, and to report on compliance with requirements applicable to each major program in accordance with OMB Circular A-133, Audits of States, Local Governments and Non-Profit Organizations.
3. The Auditor must also adhere to guidelines established by the State Department of Education (SDE) as set forth in the SDE's Single Audit Guide. The Audit Guidelines can be obtained from the SDE's Office of School District Auditing, 1429 Senate Street, Room 403, Columbia, South Carolina, 29201, telephone (803) 734-8180. The Firm must also be on the Approved audit from list published by SCDE.

## **B. Description of Spartanburg School District Two**

### **Financial Information**

The District has four major governmental funds consisting of the General Fund, Special Revenue Funds, Capital Projects Fund and the Debt Service Fund. The Food Service Fund is treated as a special revenue fund type, and the Pupil Activity Funds are also treated as a Special Revenue fund type.

### **Organization of Finance Office**

The Finance Office is under the Chief Financial Officer and consists of 5 additional FTE employees and 1 Special Revenue (Grant Based) employee. One (1) Budget Officer, one (1) Procurement Officer, one (1) Payroll Specialist, one (1) Accounts Payable Specialist, one (1) Administrative Assistant, and one (1) Special Revenue Accountant.

### **Political Information**

The Spartanburg School District Two Board of Trustees is a ten-member body elected by the public. The Board has decision-making authority to hire management, to significantly influence operations, and has accountability for fiscal matters.

## **C. Assistance Available to Proposer**

1. The Finance Office will be available to prepare schedules on a reasonable basis. The staff generally will pull requested documents. Reconciliations of all balance sheet accounts and the balancing of all funds will be completed by the Finance staff before any work begins. The Budget Officer will be available to coordinate any audit work.
2. The District is willing to provide the maximum possible assistance to the successful proposer.
3. All primary accounting records are maintained in the Finance Department.

## **D. Report Requirements**

1. All reports should be addressed to the Members of the Board of Trustees of Spartanburg School District Two.
2. The audit work must be performed in accordance with generally accepted auditing standards as established by the American Institute of Certified Public Accounts and generally accepted government auditing standards as established by the United States General Accounting Office, Comptroller General of the United States.
3. An audit opinion on the financial statements of the School District, along with an opinion on compliance with applicable regulations must be issued as discussed in the SDE'S Audit Guide.
4. The reports must include School District comments and responses on all exceptions detailed in published reports.
5. If the examination requires that a management letter be issued, then a conference will be arranged with the Chief Financial Officer and Budget Officer, and other parties designated to discuss the proposed management letter and an opportunity will be granted for a response to be made. This conference may be scheduled as a preliminary exit conference. Prior to the exit conference, a draft copy of the audit report will be made available to the Chief Financial Officer for distribution and review by selected district officials. At least seven working days will be provided for district officials to review draft copies before final copies are printed and bound. After district officials have reviewed draft copies of the report and made appropriate responses, the audit firm will deliver to the District twenty (20) copies of a bound audit report.
6. The audited financial statements must be presented to the School Board prior to the last business working day in November, and delivered to the State Department only after the Board has received the information. The audited reports and all other required data and documentation required must be received by the State Department on or before the December 1st deadline.

## **E. Time Considerations**

1. All proposals must be submitted to Spartanburg District Two no later than 9:00 a.m. on February 16<sup>th</sup>, 2023.
2. The District may elect to interview representatives from selected firms.



3. Compliance field work may be conducted in the spring of each year. The District's financial books will be available for audit by the end of September of each year.
4. Prior to the audit commencing, a formal opening audit conference will be held with the Chief Financial Officer and the Budget Officer. The audit scope, audit work time line, basis of tests to be performed, and finding resolution procedures will be discussed.
5. Not later than the first week in November of each year, an exit conference must be scheduled with the Superintendent, the Chief Financial Officer, and the Budget Officer to review a preliminary draft of the audited financials and management letter, if applicable. The District will be given an opportunity to provide written responses to the comments in the management letter which are to be included in the final draft.
6. The Board will expect the auditor to make a presentation of the financials to the full Board prior to the last business working day in November at a scheduled public meeting of the Spartanburg Two Board of Trustees.
7. During the on-site work, periodic briefings should be held with the Chief Financial Officer.
8. When working in an area, an entrance conference, periodic briefings, and exit conference should be held with the responsible Administrator and the Budget Officer.

**F. Contractual Arrangement**

1. The 2022-2023 year is the starting year to be audited under this contract. After the first three (3) years of the contract, there is an option to renew two (2) additional one-year periods if agreed to by the successful Contractor and the District. Our fiscal year begins July 1 and ends on June 30.
2. Contract renewals are subject to the availability of fiscal year funds and satisfactory performance.

This solicitation does not commit Spartanburg School District Two to award a contract, to pay any costs incurred in preparation of a bid, nor to procure any services that may be offered.

**Scope 2: Procurement Audit Services**

All information listed under Scope 2, regarding information to be provided by the proposer will also apply to the procurement audit section. The following information should be given in the RFP as Part 2 for the agreed upon procedures reviewing the District's procurement practices. Section 11-35-70 of the South Carolina Consolidated Procurement Code requires that a procurement audit be performed every three years by an audit firm approved by the Office of General Services. The District wishes to have the audit on an annual basis. The District reserves the right to contract with the Office of General Services for the procurement audit if doing so is in the best interest of the District.

**A. Report Requirements**

The audit report should be addressed to the Members of the Board of Trustees of Spartanburg School District Two. A final copy of the report is to be submitted to the Office of General Services. The report must state the scope of the procurement review and that the agreed upon procedures were performed in accordance with generally accepted auditing standards. It must also include an opinion as to whether the statements conform to generally accepted procurement principles.

If the examination requires that a management letter be issued, then a conference will be arranged with the Chief Financial Officer, Budget Officer, and Procurement Officer as well as other parties designated to discuss the proposed management letter and an opportunity will be granted for a response to be made. This conference may be scheduled as a preliminary exit conference. Prior to the exit conference, a draft copy of the procurement audit report will be made available to the Chief Financial Officer for distribution and review by selected district officials. At least seven working days will be provided for district officials to review draft copies before final copies are printed and bound. After district officials have reviewed draft copies of the procurement report and made appropriate responses, the audit firm will deliver to the District twenty (20) copies of a bound audit report.

**B. Time considerations and requirements**

1. All proposals must be submitted to Spartanburg District Two no later than 9:00 a.m. on February 16<sup>th</sup>, 2023.
2. The District may elect to interview representatives from selected firms.

3. The procurement audit or agreed upon procedures can commence on a date mutually agreed upon by the firm and the District in order for the report to be completed and presented to Board prior to the last business working day in November.
4. Prior to the audit commencing, a formal opening audit conference will be held with the Chief Financial Officer and the Budget Officer. The audit scope, audit work time line, basis of tests to be performed, and finding resolution procedures will be discussed.
5. Not later than the first week in November of each year, an exit conference must be scheduled with Superintendent, Chief Financial Officer, and the Budget Officer to review a preliminary draft of the audit and any management letter issues deemed appropriate. The District will be given an opportunity to provide written responses to the comments in the management letter which are to be included in the final draft.
6. The Board will expect the auditor to make a presentation of the report to the full Board prior to the last business working day in November at a regular scheduled public meeting of the Spartanburg Two Board of Trustees.
7. During the on-site work, periodic briefings should be held with the Chief Financial Officer and Procurement Officer.
8. When working in an area, an entrance conference, periodic briefings, and exit conference should be held with the responsible Administrator and the Budget Officer.

**C. Contractual Arrangement**

1. The 2022-2023 year is the starting year to be audited under this contract. After the first three (3) years of the contract, there is an option to renew two (2) additional one-year periods if agreed to by the successful Contractor and the District. Our fiscal year begins July 1 and ends on June 30.
1. Contract renewals are subject to the availability of fiscal year funds and satisfactory performance.

**D. Working papers**

Working papers will be retained by the successful firm for five years after the completion of each procurement audit (agreed upon procedures). The working papers must be made available for examination without charge to the District and the Office of General Services. These papers should be made available prior to the issuance of the final report.

**E. Firm’s approach to the examination**

Submit a work plan and time estimates for each significant segment of the work to be completed and the qualifications of the staff to be assigned to each segment. Where possible, individual staff members should be named. The procurement audit must be performed in accordance with the audit program developed by the South Carolina Budget and Control Board-Procurement Services Division, where applicable to the District’s Procurement Policy.

The firm recommended must be approved by the Office of General Services as required by Section 11-35-70 of the South Carolina Consolidated Procurement Code and on the SCDE approved Audit Firm listing.

**INFORMATION FOR OFFEROR TO SUBMIT**

You shall submit a signed Cover Page and all other information and documents requested in this part and Special Instructions, Scope of Work/Specifications and any Attachments to Solicitation. You should submit a summary of all insurance policies you have or plan to acquire to comply with the insurance requirements stated herein.

**PROPOSER INFORMATION**

Proposer must respond to each of the following areas of concern. Failure to respond to each of the points below may result in your proposal being deemed non-responsive. Respond in the sequence below.

1. School District or Governmental Audit Experience.
2. Professional Reputation as an Audit Firm.

3. Comprehensiveness of audit work plan.
4. Reasonableness of time estimates.
5. Technical experience of the staff members working on the audit engagement.
6. Qualifications of staff members.
7. Past history in meeting the reporting deadlines required by the State Department of Education.
8. Three References of clients and review of the latest peer review report.
9. Cost to District.

#### **IV. AWARD CRITERIA**

The District intends to award a contract resulting from this Request for Proposals to the lowest overall responsive and responsible bidder. Award may be made to more than one Offeror. In determining award, unit prices will govern over extended prices unless otherwise stated. The District reserves the right to waive any guidelines set forth if deemed to be beneficial to the District.

Selection will be based upon the following criteria in order of importance. The proposer must respond to each concern.

- 1. Cost to the District = 50 Points**
- 2. Qualifications of proposer’s staff/ References/ Technical experience = 25 Points**
- 3. Professional Reputation/ Experience with School District(s)/ Comprehensiveness = 25 Points**

**Total Points = 100**

NEGOTIATIONS/AMENDMENTS: The Procurement Officer may elect to make an award without conducting negotiations. However, he/she may elect to negotiate the pricing or the general scope of work starting with the low bidder or the highest ranked offeror or subsequently ranked offerors as long as the solicitation is not materially changed. Additionally, it is recognized that the School District is a fluid and changing environment and that these changes can include the addition or closing of schools and/or properties, and the offering of new, unforeseen or improved products and/or services generally covered under the overall scope or intent of this solicitation. The contract formed under the award of this solicitation may therefore be mutually amended to include or exclude certain products or services whether a service, product or service and product award was initially issued. This can be accomplished by mutual acknowledgement in written form including email, and this will modify this solicitation and the contract issued pursuant to it.

#### **V. TERMS AND CONDITIONS**

1. ASSIGNMENT: No contract or its provisions may be assigned, sublet, or transferred without the written consent of the Procurement Officer.
2. Background Checks:
  - (1) As a minimum, the Bidder shall obtain a complete South Carolina statewide criminal background investigation for all individuals and employees performing work or services for Bidder or any other entities such as subcontractors, sub-sub-contractors, and consultants who will perform work or a service on this project. In the event that the individual being investigated is from out of state, the criminal background investigation shall be broadened to include their home state, as well as the state of South Carolina as outlined above. The company providing such information must be recognized by local law enforcement agency as qualified to do so. In addition, the Bidder shall check employees against the National Database of Registered Sex Offenders. Any individual that is registered as a sex offender will not be permitted on school property.
  - (2) All costs associated with these criminal background checks are the responsibility of the bidder.
  - (3) The Bidder shall be responsible and liable for the conduct and actions of their employees and all individuals working under them.

(4) Any individual with the following criminal convictions or pending charges will not be permitted on any school project or property.

- Rape or Criminal Sexual Conduct
- Child Molestation or Abuse
- Any Sexually Oriented Crime
- Drugs: Felony use, possession or distribution.
- Violent crimes
- Robbery
- Felony

(5) Any individual with a prior conviction or pending charges contained in the aforementioned list shall not be permitted on the District's property.

(6) The District may, at any time, request verification of criminal background investigation for any employee or subcontractor on school property.

3. **BANKRUPTCY:** (a) Notice. In the event the Contractor enters into proceedings relating to bankruptcy, whether voluntary or involuntary, the Contractor agrees to furnish written notification of the bankruptcy to Spartanburg School District Two. This notification shall be furnished within five (5) days of the initiation of the proceedings relating to the bankruptcy filing. This notification shall include the date on which the bankruptcy petition was filed, the identity of the court in which the bankruptcy petition was filed, and a listing of all District contracts against which final payment has not been made. This obligation remains in effect until final payment under this Contract. (b) Termination. This contract is voidable and subject to immediate termination by the District upon the contractor's insolvency, including the filing of proceedings in bankruptcy.

4. **CHANGES:**

(1) Contract Modification. By a written order, at any time, and without notice to any surety, the Procurement Officer may, subject to all appropriate adjustments, make changes within the general scope of this contract in any one or more of the following:

- (a) drawings, designs, or specifications, if the supplies to be furnished are to be specially manufactured for the [District] in accordance therewith;
- (b) method of shipment or packing;
- (c) place of delivery;
- (d) description of services to be performed;
- (e) time of performance (i.e., hours of the day, days of the week, etc.); or,
- (f) place of performance of the services.

Subparagraphs (a) to (c) apply only if supplies are furnished under this contract. Subparagraphs (d) to (f) apply only if services are performed under this contract.

(2) Adjustments of Price or Time for Performance. If any such change increases or decreases the contractor's cost of, or the time required for, performance of any part of the work under this contract, whether or not changed by the order, an adjustment shall be made in the contract price, the delivery schedule, or both, and the contract modified in writing accordingly. Any adjustment in contract price made pursuant to this clause shall be determined in accordance with the Price Adjustment Clause of this contract. Failure of the parties to agree to an adjustment shall not excuse the contractor from proceeding with the contract as changed, provided that the District promptly and duly make such provisional adjustments in payment or time for performance as may be reasonable. By proceeding with the work, the contractor shall not be deemed to have prejudiced any claim for additional compensation, or an extension of time for completion.

(3) Time Period for Claim. Within 30 days after receipt of a written contract modification under Paragraph (1) of this clause, unless such period is extended by the Procurement Officer in writing, the contractor shall file notice of intent to assert a claim for an adjustment. Later notification shall not bar the contractor's claim unless the District is prejudiced by the delay in notification.

(4) Claim Barred After Final Payment. No claim by the contractor for an adjustment hereunder shall be allowed if notice is not given prior to final payment under this contract.

5. **CHOICE-OF-LAW:** The Agreement, any dispute, claim, or controversy relating to the Agreement, and all the rights and obligations of the parties shall, in all respects, be interpreted, construed, enforced and governed by and under the laws of the State of South Carolina, except its choice of law rules. As used in this paragraph, the term "Agreement" means any transaction or agreement arising out of, relating to, or contemplated by the solicitation.

6. **COMPLIANCE WITH LAWS:** During the term of the contract, contractor shall comply with all applicable provisions of laws, codes, ordinances, rules, regulations, and tariffs.

7. **CONTRACT DOCUMENTS & ORDER OF PRECEDENCE:** (a) Any contract resulting from this solicitation shall consist of the following documents: (1) a Record of Negotiations, if any, executed by you and the Procurement Officer, (2) documentation regarding the clarification of an offer [Article 5, Section 1530.8], if applicable, (3) the solicitation, as amended, (4) modifications, if any, to your offer, if accepted by the Procurement Officer, (5) your offer, (6) any statement reflecting the District's final acceptance (a/k/a "award"), and (7) purchase orders. These documents shall be read to be consistent and complimentary. Any conflict among these documents shall be resolved by giving priority to these documents in the order listed above. (b) The terms and conditions of documents (1) through (6) above shall apply notwithstanding any additional or different terms and conditions in either (i) a purchase order or other instrument submitted by the District or (ii) any invoice or other document submitted by Contractor. Except as otherwise allowed herein, the terms and conditions of all such documents shall be void and of no effect. (c) Any document signed or otherwise agreed to by persons other than the Procurement Officer shall be void and of no effect.
8. **CONTRACT LIMITATIONS:** No sales may be made pursuant to this contract for any item or service that is not expressly listed. No sales may be made pursuant to this contract after expiration of this contract. Violation of this provision may result in termination of this contract and may subject contractor to suspension or debarment.
9. **CONTRACTOR'S LIABILITY INSURANCE REQUIREMENTS:**
- a. Contractor shall procure from a company or companies lawfully authorized to do business in South Carolina and with a current A.M. Best rating of no less than A: VII, and maintain for the duration of the contract, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work and the results of that work by the contractor, his agents, representatives, employees or subcontractors.
  - b. Coverage shall be at least as broad as:
    - (1) Commercial General Liability (CGL): Insurance Services Office (ISO) Form CG 00 01 12 07 covering CGL on an "occurrence" basis, including products-completed operations, personal and advertising injury, with limits no less than \$1,000,000 per occurrence. If a general aggregate limit applies, the general aggregate limit shall be twice the required occurrence limit. This contract shall be considered to be an "insured contract" as defined in the policy.
    - (2) Auto Liability: ISO Form Number CA 00 01 covering any auto (Code 1), or if Contractor has no owned autos, hired, (Code 8) and non-owned autos (Code 9), with limits no less than \$1,000,000 per accident for bodily injury and property damage.
    - (3) Worker's Compensation: As required by the State of South Carolina, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease.
  - c. The District, and its officers, officials, employees and volunteers, must be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Contractor including materials, parts or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Contractor's insurance at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10 and CG 20 37 if a later edition is used.
  - d. For any claims related to this contract, the Contractor's insurance coverage shall be primary insurance as respects the District, the officers, officials, employees and volunteers. Any insurance or self-insurance maintained by the District, officers, officials, employees and volunteers, shall be excess of the Contractor's insurance and shall not contribute with it.
  - e. Prior to commencement of the work, the Contractor shall furnish the District with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this section. All certificates are to be received and approved by the District before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Contractor's obligation to provide them. The District reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by this section, at any time.
  - f. Should any of the above-described policies be cancelled before the expiration date thereof, notice will be delivered in accordance with the policy provisions. In addition, the Contractor shall notify the District immediately upon receiving any information that any of the coverages required by this section are or will be changed, cancelled, or replaced.
  - g. Contractor hereby grants to the District a waiver of any right to subrogation which any insurer of said Contractor may acquire against the District by virtue of the payment of any loss under such insurance. Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the District has received a waiver of subrogation endorsement from the insurer.
  - h. Any deductibles or self-insured retentions must be declared to and approved by the District. The District may require the Contractor to purchase coverage with a lower deductible or retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.
  - i. The District reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.
10. **CONTRACTOR PERSONNEL:** The Contractor shall enforce strict discipline and good order among the Contractor's employees and other persons carrying out the Contract. The Contractor shall not permit employment of unfit persons or persons not skilled in tasks assigned to them.

11. **CONTRACTOR'S OBLIGATION:** The contractor shall provide and pay for all materials, tools, equipment, labor and professional and non-professional services, and shall perform all other acts and supply all other things necessary, to fully and properly perform and complete the work. The contractor must act as the prime contractor and assume full responsibility for any subcontractor's performance. The contractor will be considered the sole point of contact with regard to all situations, including payment of all charges and the meeting of all other requirements.
12. **CONTRACTOR'S USE OF DISTRICT PROPERTY:** Upon termination of the contract for any reason, the District shall have the right, upon demand, to obtain access to, and possession of, all District properties, including, but not limited to, current copies of all District application programs and necessary documentation, all data, files, intermediate materials and supplies held by the contractor. Contractor shall not use, reproduce, distribute, display, or sell any data, material, or documentation owned exclusively by the District without the District's written consent, except to the extent necessary to carry out the work.
13. **DEFAULT:** The District may terminate this contract, or any part hereof, for cause in the event of any default by the contractor, or if the contractor fails to comply with any contract terms and conditions, or fails to provide the District, upon request, with adequate assurances of future performance. In the event of termination for cause, the District shall not be liable to the contractor for any amount for supplies or services not accepted, and the contractor shall be liable to the District for any and all rights and remedies provided by law. If it is determined that the District improperly terminated this contract for default, such termination shall be deemed a termination for convenience.
14. **DISPOSAL OF PACKAGING:** Contractor shall dispose of all wrappings, crating, and other disposable materials pertaining to this contract at the end of each working day and upon completion of installation.
15. **ILLEGAL IMMIGRATION:** By signing your offer, you certify that you will comply with the applicable requirements of Title 8, Chapter 14 of the South Carolina Code of Laws and agree to provide to the State upon request any documentation required to establish either: (a) that Title 8, Chapter 14 is inapplicable to you and your subcontractors or sub-subcontractors; or (b) that you and your subcontractors or sub-subcontractors are in compliance with Title 8, Chapter 14. Pursuant to Section 8-14-60, "A person who knowingly makes or files any false, fictitious, or fraudulent document, statement, or report pursuant to this chapter is guilty of a felony and, upon conviction, must be fined within the discretion of the court or imprisoned for not more than five years, or both." You agree to include in any contracts with your subcontractor's language requiring your subcontractors to (a) comply with the applicable requirements of Title 8, Chapter 14, and (b) include in their contracts with the sub-subcontractor's language requiring the sub-subcontractors to comply with the applicable requirements of Title 8, Chapter 14.
16. **INDEMNIFICATION - THIRD PARTY CLAIMS:** Notwithstanding any limitation in this agreement, and to the fullest extent permitted by law, Contractor shall defend and hold harmless Indemnitees for and against any and all suits or claims of any character (and all related damages, settlement payments, attorneys' fees, costs, expenses, losses or liabilities) by a third party which are attributable to bodily injury, sickness, disease or death, or to injury to or destruction of tangible property arising out of or in connection with the goods or services acquired hereunder or caused in whole or in part by any act or omission of contractor, its subcontractors, their employees, workmen, servants, agents, or anyone directly or indirectly employed by them or anyone for whose acts any of them may be liable, regardless of whether or not caused in part by an Indemnitee, and whether or not such claims are made by a third party or an Indemnitee; however, if an Indemnitee's negligent act or omission is subsequently determined to be the sole proximate cause of a suit or claim, the Indemnitee shall not be entitled to indemnification hereunder. Contractor shall be given timely written notice of any suit or claim. Contractor's obligations hereunder are in no way limited by any protection afforded under workers' compensation acts, disability benefits acts, or other employee benefit acts. This clause shall not negate, abridge, or reduce any other rights or obligations of indemnity which would otherwise exist. The obligations of this paragraph shall survive termination, cancelation, or expiration of the parties' agreement. This provision shall be construed fairly and reasonably, neither strongly for nor against either party, and without regard to any clause regarding insurance. As used in this clause, "Indemnitees" means Spartanburg School District Two, its instrumentalities, agencies, departments, boards, and all their respective officers, agents and employees.
17. **LICENSES AND PERMITS:** During the term of the contract, the Contractor shall be responsible for obtaining, and maintaining in good standing, all licenses (including professional licenses, if any), permits, inspections and related fees for each or any such licenses, permits and /or inspections required by the State, county, city or other government entity or unit to accomplish the work specified in this solicitation and the contract.
18. **MATERIAL AND WORKMANSHIP:** Unless otherwise specifically provided in this contract, all equipment, material, and articles incorporated in the work covered by this contract are to be new and of the most suitable grade for the purpose intended.
19. **OWNERSHIP OF DATA & MATERIALS:** All data, material and documentation prepared for the District pursuant to this contract shall belong exclusively to the District.
20. **PRICE ADJUSTMENTS - LIMITED BY CPI "Other Goods & Services":** Upon request and adequate justification, the Procurement

Officer may grant a price increase up to, but not to exceed, the unadjusted percent change for the most recent 12 months for which data is available, that is not subject to revision, in the Consumer Price Index (CPI) for all urban consumers (CPI-U), "Other Goods & Services" for services and/or the Producer Price Index (PPI), whichever is applicable, as determined by the Procurement Officer. The Bureau of Labor and Statistics publishes this information on the web at [www.bls.gov](http://www.bls.gov). Price adjustments must be requested in writing annually, 45 days prior to renewal.

21. **RELATIONSHIP OF THE PARTIES:** Neither party is an employee, agent, partner, or joint ventures of the other. Neither party has the right or ability to bind the other to any agreement with a third party or to incur any obligation or liability on behalf of the other party.
22. **SHIPPING/ RISK OF LOSS:** F.O.B. Destination. Destination is the shipping location of the Districts' designated receiving site, as specified herein.
23. **TERMINATION FOR CONVENIENCE:** The Procurement Officer may terminate this contract in whole or in part, for the convenience of the District. In such a termination, the Procurement Officer may require the contractor to transfer title and deliver to the District in the manner and to the extent directed by the Procurement Officer: (a) any completed supplies; and (b) such partially completed supplies and materials, parts, tools, dies, jigs, fixtures, plans, drawings, information, and contract rights (hereinafter called "manufacturing material") as the contractor has specifically produced or specially acquired for the performance of the terminated part of this contract. Upon such termination, the contractor shall (a) stop work to the extent specified, (b) terminate any subcontracts as they relate to the terminated work, and (c) be paid the following amounts without duplication, subject to the other terms of this contract: (i) contract prices for supplies or services accepted under the contract, (ii) costs incurred in performing the terminated portion of the work, and (iii) any other reasonable costs that the contractor can demonstrate to the satisfaction of the District, using its standard record keeping system, have resulted from the termination. The contractor shall not be paid for any work performed or costs incurred that reasonably could have been avoided. As a condition of payment, contractor shall submit within three months of the effective date of the termination a claim specifying the amounts due because of the termination. The absence of an appropriate termination for convenience clause in any subcontract shall not increase the obligation of the District beyond what it would have been had the subcontract contained such a clause.
24. **WARRANTY:** Contractor must provide the manufacturer's standard written warranty upon delivery of product. Contractor warrants that manufacturer will honor the standard written warranty provided.
1. **DISCUSSIONS WITH BIDDERS:** After opening, the Procurement Officer may, in his sole discretion, initiate discussions with you to discuss your bid. Discussions are possible only if your bid is apparently responsive and only for the purpose of clarification to assure your full understanding of the solicitation's requirements. Any discussions will be documented in writing and shall be included with the bid.
2. **DISPUTES:**
  - (1) Choice-of-Forum. All disputes, claims, or controversies relating to an Agreement shall be resolved exclusively by the Chief Procurement Officer in accordance with Title 11, Chapter 35, Article 17 of the South Carolina Code of Laws, or in the absence of jurisdiction, only in the Court of Common Pleas for, or a federal court in the State of South Carolina. Contractor agrees that any act by Spartanburg School District Two regarding an Agreement is not a waiver of either the District's sovereign immunity or immunity under the Eleventh Amendment of the United States Constitution. As used in this paragraph, the term "Agreement" means any transaction or agreement arising out of, relating to, or contemplated by this solicitation.
  - (2) Service of Process. Contractor consents that any papers, notices, or process necessary or proper for the initiation or continuation of any disputes, claims, or controversies relating to an Agreement; for any court action in connection therewith; or for the entry of judgment on any award made, may be served on Contractor by certified mail (return receipt requested) addressed to Contractor at the address provided, or by personal service, or by any other manner that is permitted by law, in or outside South Carolina. Notice by certified mail is deemed duly given upon deposit in the United States mail.
3. **EQUAL OPPORTUNITY:** Contractor is referred to and shall comply with all applicable provisions, if any, of Title 41, Part 60 of the Code of Federal Regulations, including but not limited to Sections 60-1.4, 60-4.2, 60-4.3, 60-250.5(a), and 60-741.5(a), which are hereby incorporated by reference.
4. **FALSE CLAIMS:** According to the S.C. Code of Laws Section 16-13-240, "a person who by false pretense or representation obtains the signature of a person to a written instrument or obtains from another person any chattel, money, valuable security, or other property, real or personal, with intent to cheat and defraud a person of that property is guilty" of a crime.
5. **FORCE MAJURE:** The Contractor shall not be liable for any excess costs if the failure to perform the contract arises out of causes beyond the control and without the fault or negligence of the contractor. Such causes may include, but are not restricted to acts of God or of the public enemy, acts of the Government in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, and unusually severe weather; but in every case the failure to perform must be beyond the

control and without the fault or negligence of the contractor. If the failure to perform is caused by the default of a subcontractor, and if such default arises out of causes beyond the control of both the contractor and subcontractor, and without the fault or negligence of either of them, the contractor shall not be liable for any excess costs for failure to perform, unless the supplies or services to be furnished by the subcontractor were obtainable from other sources in sufficient time to permit the contractor to meet the required delivery schedule.

6. **NON-INDEMNIFICATION:** Any term or condition is void to the extent it requires the District to indemnify anyone.
7. **NOTICE:** (A) After award, any notices shall be in writing and shall be deemed duly given (1) upon actual delivery, if delivery is by hand, (2) upon receipt by the transmitting party of automated confirmation or answer back from the recipient's device if delivery is by telex, telegram, facsimile, or electronic mail, or (3) upon deposit into the United States mail, if postage is prepaid, a return receipt is requested, and either registered or certified mail is used.
8. **PUBLICITY:** Contractor shall not publish any comments or quotes by Spartanburg School District Two employees, or include the District in either news releases or a published list of customers, without the prior written approval of the Procurement Officer.
9. **PURCHASE ORDERS:** Contractor shall not perform any work prior to the receipt of a purchase order from the District. The District shall order any supplies to be furnished under this contract by issuing a purchase order. Purchase orders may be used to elect any options available under this contract, e.g., quantity, item, delivery date, payment method, but are subject to all terms and conditions of this contract. Purchase orders may be electronic. No particular form is required.
10. **SETOFF:** The District shall have all of its legal, equitable, and statutory rights of set-off. These rights shall include, but not be limited to, the District's option to withhold for the purposes of set-off any moneys due to the Contractor under this contract up to any amounts due and owing to the District with regard to this contract including any contract for a term commencing prior to the term of this contract, plus any amounts due and owing to the District for any other reason including, without limitation, tax delinquencies, fee delinquencies or monetary penalties relative thereto.
11. **SURVIVAL OF OBLIGATION:** The Parties' rights and obligations which, by their nature, would continue beyond the termination, cancellation, rejection, or expiration of this contract shall survive such termination, cancellation, rejection, or expiration, including, but not limited to, the rights and obligations created by the following clauses: Indemnification - Third Party Claims, Intellectual Property Indemnification, and any provisions regarding warranty or audit.
12. **TERMINATION DUE TO UNAVAILABILITY OF FUNDS:** Payment and performance obligations for succeeding fiscal periods shall be subject to the availability and appropriation of funds thereof. When funds are not appropriated or otherwise made available to support continuation of performance in a subsequent fiscal period, the contract shall be canceled. Contractor will not be reimbursed any costs beyond the initial contract term.
13. **THIRD PARTY BENEFICIARY:** This Contract is made solely and specifically among and for the benefit of the parties hereto, and their respective successors and assigns, and no other person will have any rights, interest, or claims hereunder or be entitled to any benefits under or on account of this Contract as a third-party beneficiary or otherwise.
14. **WAIVER:** The District does not waive any prior or subsequent breach of the terms of the Contract by making payments on the Contract, by failing to terminate the Contract for lack of performance, or by failing to strictly or promptly insist upon any term of the Contract. Only the Procurement Officer has actual authority to waive any of the District's rights under this Contract. Any waiver must be in writing.
15. **TERM OF CONTRACT:** Will be as stated in the Award or Intent to Award until project completion, district sign-off and necessary receipt of any applicable warranties.
16. **OPEN TRADE REPRESENTATION:** By submitting an Offer, Offeror represents that Offeror is not currently engaged in the boycott of a person or an entity based in or doing business with a jurisdiction with whom South Carolina can enjoy open trade, as defined in SC Code Section 11-35-5300. [02-2A083-1]
17. **OPEN TRADE:** During the contract term, including any renewals or extensions, Contractor will not engage in the boycott of a person or an entity based in or doing business with a jurisdiction with whom South Carolina can enjoy open trade, as defined in SC Code Section 11-35-5300. [07-7A053-1]



**VI. BIDDING SCHEDULE**

Attach your Cost proposal matrix to this sheet when submitting the bid or use the below table.

<b>Service</b>	<b>Year 1 Rate</b>	<b>Year 2 Rate</b>	<b>Year 3 Rate</b>
<b>Procurement Audit Services</b>	\$ _____	\$ _____	\$ _____
<b>Financial Audit Services</b>	\$ _____	\$ _____	\$ _____
<b>Additional Work Services</b>	<b>Hourly Rate:</b> \$ _____	<b>Hourly Rate:</b> \$ _____	<b>Hourly Rate:</b> \$ _____

Pricing above to include all labor, travel, parts, equipment and all other charges. The District will not be responsible for any other charges or fees.

**Bidder/Company name (Please print):** \_\_\_\_\_

**Authorized Signature & Date:** \_\_\_\_\_

**Bid Checklist/Reference Sheet**

**Have you included the following?**

**Bid Cover Sheet (Page 1)** \_\_\_\_\_

**Bid Pricing Sheet (Page 17)** \_\_\_\_\_

**Bidder Information Sheet (Page 19)** \_\_\_\_\_

**Completed W-9 Form** \_\_\_\_\_

**Evidence of Insurance** \_\_\_\_\_

**Copy of Business License** \_\_\_\_\_

**Proposer Information Responses (Page 10-11)** \_\_\_\_\_

**BIDDER INFORMATION**

I, the undersigned, certify that this bid does not violate any Federal or State antitrust laws.

Bidder's Federal ID or Social Security Number: \_\_\_\_\_  
Please attach copy of W-9 form.

All bidders who are authorized to collect South Carolina sales tax must state their South Carolina tax registration number.

South Carolina Tax Registration Number: \_\_\_\_\_

Is your company a minority-owned company? Yes \_\_\_ No \_\_\_ OSMBA Cert # \_\_\_\_\_

Bidder Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Email: \_\_\_\_\_

In compliance with the invitation and subject to all conditions thereof the undersigned offers and agrees, if this bid is accepted within 60 days from the date of opening, to furnish any or all items quoted on at prices as set forth after the item and make delivery, immediately after receipt of order, delivered, all transportation costs included and prepaid and unless otherwise stated and accepted herein.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same services, materials, supplies, or equipment, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this bid for the bidder.

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_  
(Printed or Typed)