

# IDEA Florida, Inc. Professional Auditing Services

Request for Proposal # 38-FLAUDIT-0524

IDEA Florida, Inc.  
PURCHASING DEPARTMENT  
[solicitations@ideapublicschools.org](mailto:solicitations@ideapublicschools.org)



**IDEA**  
**Public Schools**

# REQUEST FOR PROPOSAL: PROFESSIONAL AUDITING SERVICES

IDEA Florida, Inc. is a not-for-profit agency that operates public charter schools in **Hillsborough, Polk, and Duval** School Districts. We are requesting proposals for an independent auditor to conduct our annual audits in accordance with Florida Statutes 1002.33(9) and 218.391. All of the information to assist with developing your proposal can be found within this RFP.

## ***RFP INFORMATION AT A GLANCE***

<b>Tentative RFP Timeline</b>	<b>Professional Auditing Services</b>
<b>Mail Proposals To:</b>	<b>IDEA Public Schools Inc., in C/O IDEA Florida, Inc.</b> 2115 W. Pike Blvd. Weslaco, TX 78596
<b>RFP Issue Date:</b>	March 27, 2024
<b>First Advertisement Date/Issue Date:</b>	March 27, 2024
<b>Second Advertisement Date:</b>	April 3, 2024
<b>Pre-Proposal Conference</b>	Thursday, April 4, 2024, at 11:00 AM CST via <a href="#">Microsoft Teams</a>
<b>Respondent Question Cut-Off Date:</b>	Friday, April 5, 2024, at 12:00 PM CST
<b>Questions Response from IDEA:</b>	April 10, 2024
<b>RFP Due Date &amp; Time:</b>	<b>Wednesday, April 17, 2024, at 2:00 PM CST</b>
<b>Anticipated Evaluation Period:</b>	April 22, 2024 - April 26, 2024
<b>Board Meeting &amp; Approval:</b>	May 22, 2024
<b>Initial Proposed Contract Term:</b>	Upon Execution Date to May 1, 2025

**Pre-Proposal Meeting:** The Pre-Proposal Meeting will be held via [Microsoft Teams](#): Meeting ID: 247 105 669 341 / Passcode: ySU8a4 on **Thursday, April 4, 2024, at 11:00 AM CST**. Any information given to one prospective vendor will be furnished to all prospective vendors as an Addendum if such information is necessary to vendors in submitting their proposals or if the lack is such information would be prejudicial to an uninformed vendor.

If you have any questions regarding this RFP process, please contact the Solicitations Department at [solicitations@ideapublicschools.org](mailto:solicitations@ideapublicschools.org). Proposals must be delivered to and received **no later than Wednesday, April 17, 2024, at 2:00 PM CST**.

**Proposal Submission:** Proposals may be submitted using the [Public Purchase](#) website or by sending one (1) clearly identified hard copy ORIGINAL of the Proposal to:

**IDEA Public Schools, Inc. in C/O IDEA Public Schools Florida, Inc.**

**RFP # 38-FLAUDIT-0524**

Attn. Purchasing Department

2115 West Pike Blvd

Weslaco, TX 78596

***Note: Faxed or emailed Proposals will not be accepted.***

**Funding Type:** IDEA will utilize **Florida Education Finance Program funds** to finance any purchases of goods and/or services through the contract(s) awarded to the successful Vendor(s)/Contractor(s) through this RFP, including any purchase orders issued under said contract(s).

**Proposal Specific Requirements:**

Vendor Minimum Qualifications

- 1. The firm/vendor must have a minimum of 5 years' experience in education auditing.
- 2. Should have a proven successful history of providing similar services to institutions in the State of Florida.
- 3. The firm or controlling partners can provide information on the results of any federal or state desk reviews or field reviews of its audits during the past three (3) years.
- 4. The firm/vendor will provide final audit report by September 13, 2024.

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## I. INTRODUCTION AND GENERAL INFORMATION

### A. General Information and Term of Engagement

IDEA Florida, Inc. is requesting proposals from qualified independent Certified Public Accounting firms to audit its financial statements as specified in **Section D – Nature of Services Required** for the fiscal year ending **June 30, 2024, and the two (2) fiscal years thereafter**. Future engagement options will be recognized through two (2) one-year extensions after the first year ending June 30, 2024. This is a Financial Audit as required under Section 218.39, Florida Statutes. Pursuant to Section 1002.333(6)(h), Florida Statutes, the audit shall be a financial audit of the nonprofit which includes all Schools of Hope it operates within Florida and which complies with Section 218.30 regarding audits of a school board.

**TABLE 1: SCHOOL OPERATIONS**

Florida County	IDEA Campus	Dates of Operation
Hillsborough	<b>IDEA Hope</b> 5050 E. 10 <sup>th</sup> Ave. Tampa, FL 33619 <b>IDEA Victory</b> 11612 N. Nebraska Ave. Tampa, FL 33612	2021 - Present
Duval	<b>IDEA Bassett</b> 1845 Bassett Rd. Jacksonville, FL 32208 <b>IDEA River Bluff</b> 2354 University Blvd. N. Jacksonville, FL 32211 <b>IDEA Compass</b> 4949 Blanding Boulevard Jacksonville, FL 32210	2022 – Present       TBD
Polk	<b>IDEA Lakeland</b> 1775 Interstate Dr. Lakeland FL 33805	TBD

*\*Major Programs Include (Child Nutrition Program (CNP), ESSER, and School of Hope)*

**TABLE 2: PROJECTION OF FUTURE CAMPUS SITES OF IDEA FLORIDA, INC.**

School Year	Hillsborough County Campuses	Duval County Campuses	Polk County Campuses
<b>2020-2021</b>			
<b>2021-2022</b>	<b>IDEA Hope</b> 5050 E. 10 <sup>th</sup> Ave. Tampa, FL 33619 <b>IDEA Victory</b> 11612 N. Nebraska Ave. Tampa, FL 33612		
<b>2022-2023</b>	<b>IDEA Hope</b> 5050 E. 10 <sup>th</sup> Ave. Tampa, FL 33619 <b>IDEA Victory</b> 11612 N. Nebraska Ave. Tampa, FL 33612	<b>IDEA Bassett</b> 1845 Bassett Rd. Jacksonville, FL 32208 <b>IDEA River Bluff</b> 2354 University Blvd. N. Jacksonville, FL 32211	
<b>2023-2024</b>	<b>IDEA Hope</b> 5050 E. 10 <sup>th</sup> Ave.	<b>IDEA Bassett</b> 1845 Bassett Rd.	

	Tampa, FL 33619 <b>IDEA Victory</b> 11612 N. Nebraska Ave. Tampa, FL 33612	Jacksonville, FL 32208 <b>IDEA River Bluff</b> 2354 University Blvd. N. Jacksonville, FL 32211	
<b>2024-2025</b>	<b>IDEA Hope</b> 5050 E. 10 <sup>th</sup> Ave. Tampa, FL 33619 <b>IDEA Victory</b> 11612 N. Nebraska Ave. Tampa, FL 33612	<b>IDEA Bassett</b> 1845 Bassett Rd. Jacksonville, FL 32208 <b>IDEA River Bluff</b> 2354 University Blvd. N. Jacksonville, FL 32211	<b>IDEA Lakeland</b> 1775 Interstate Dr. Lakeland FL 33805 <b>(opening TBD)</b>
<b>2025-2026</b>	<b>IDEA Hope</b> 5050 E. 10 <sup>th</sup> Ave. Tampa, FL 33619 <b>IDEA Victory</b> 11612 N. Nebraska Ave. Tampa, FL 33612	<b>IDEA Bassett</b> 1845 Bassett Rd. Jacksonville, FL 32208 <b>IDEA River Bluff</b> 2354 University Blvd. N. Jacksonville, FL 32211 <b>IDEA Compass</b> 4949 Blanding Boulevard Jacksonville, FL 32210 <b>(opening TBD)</b>	<b>IDEA Lakeland</b> 1775 Interstate Dr. Lakeland FL 33805 <b>(opening TBD)</b>

**TABLE 3: PROJECTION OF FUTURE SCHOOL OPERATIONS OF IDEA FLORIDA, INC.**

School Year	Number of Campuses	Projected Enrollment
<b>2020-2021</b>	<b>0</b>	<b>0</b>
<b>2021-2022</b>	<b>2</b>	<b>950</b>
<b>2022-2023</b>	<b>5</b>	<b>2,800</b>
<b>2023-2024</b>	<b>6</b>	<b>4,900</b>
<b>2024-2025</b>	<b>10</b>	<b>8,000</b>
<b>2025-2026</b>	<b>14</b>	<b>15,000</b>

## B. Information and Clarification

All requests for information or clarification regarding this proposal should be addressed to the IDEA Procurement & Contract Services team, whose contact information is included on the first page of this RFP.

## C. Presentation Costs

IDEA Florida, Inc. shall not be liable for any costs, fees or expenses incurred by any firm in responding to the Request for Proposal or any subsequent inquiries or presentation relating to a response.

# II. Nature of Services Required

## A. General

IDEA Florida, Inc. is soliciting the services of qualified firms of certified public accountants to audit its financial statement for the fiscal year ending **June 30, 2024, and the two (2) subsequent years**. This audit is to be performed in accordance with the provisions contained in this request for proposal.

## B. Scope of Work to Be Performed

IDEA Florida, Inc. desires the auditor to express opinion on the fair presentation of its basic financial statements in conformity with accounting principles generally accepted in the United States of America and the financial reporting requirement of Governmental Accounting Standards Statement No. 34.

## C. Auditing Standards to Be Followed

To meet the requirements of this Request for Proposal, the audit shall be performed in accordance with

- Generally accepted auditing standards as set forth by the American Institute of Certified, Public Accountants
- Generally accepted government auditing standards as promulgated by the General Accounting Office
- The requirements established by the Auditor General of the State of Florida
- Other applicable federal, state, and local laws or regulations.

## D. Reports to Be Issued

Following the completion of the audit of the fiscal year's financial statements, the auditor shall issue the following reports:

- A consolidated report on the fair presentation of the basic financial statements, in conformity with generally accepted accounting principles (GAAP) for not for profit entities.
- A report on the fair presentation of the basic financial statements, in conformity with generally accepted accounting principles (GAAP) for governmental entities for each county with an active site/campus.
- Independent Auditor's Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards*
- Independent Auditor's Report on Compliance for each major program and on internal control over compliance required by the uniform guidance

***\*Major Programs Include (Child Nutrition Program (CNP), ESSER, and School of Hope)***

In the required reports on internal controls, the auditor shall communicate any reportable conditions found during the audit. A reportable condition shall be defined as a significant deficiency in the design or operation of the internal control which could adversely affect the organization's ability to record, process summarize and report financial data consistent with the assertions of management in the financial statements.

Reportable conditions that are also material weaknesses shall be identified as such in the report.

Non-reportable conditions discovered by the auditors shall be reported in a separate letter to management, which shall be referred to in the reports on internal controls.

The report on compliance shall include all material instances of noncompliance. All nonmaterial instances of noncompliance shall be reported in a separate management letter, which shall be referred to in the report on compliance.

The auditors shall be required to make an immediate, written report of all irregularities and illegal acts of which they become aware to IDEA Florida, Inc. and the Board of Directors of the IDEA Florida, Inc.

## E. Form 990

IDEA Florida, Inc. also intends for the auditor to complete the annual form 990 for submission to the IRS.

III. Description of the IDEA Florida, Inc. Charter Schools

A. Name and Telephone Number of Contact Persons

The auditor's primary contact with the IDEA Florida Charter School will be **Denise Gonzalez, Finance Project Manager, (956)351-3783.**

B. Background Information

IDEA Florida, Inc. was established as a 501 c3 nonprofit organization for the purposes of operating public charter schools. Each school operates under a performance-based agreement (Charter contract) granted by the School Districts in which the schools are located.

The IDEA Florida, Inc.'s fiscal year begins on July 1, and ends on June 30. Budgets are adopted annually, and expenditures are controlled in accordance with written policies and procedures.

C. Fund Structure

The IDEA Florida, inc. currently uses the following fund types and account groups in its financial reporting:

<i>Fund Type / Account Group</i>	<i># of Individual Funds</i>
<i>General Fund</i>	1 Fund
<i>Agency Fund</i>	1 Fund

D. Annual Budget

The IDEA Florida, Inc. annual budget consists of approximately \$70,250,139 in revenue, and the IDEA Florida, inc. current approximate net assets are valued at \$2,263,483. IDEA Florida, inc. projected revenue for the years ended June 30, 2023, and 2024 are \$51,254,325 and \$68,518,984 respectively.

IV. Time Requirements

A. Time Schedule for Each Fiscal Year's Audit

The IDEA Florida, Inc. and Auditors will mutually agree on a timetable table to be developed for the audit of each fiscal year. The schedule shall include dates for completing each of the following steps by the auditors no later than the agreed upon date for each year of the audit. Each of the following shall be completed by the auditor no later than the dates indicated.

1. Audit Plans:

The auditor shall provide a detailed audit plan and a list of all schedules to be prepared by the IDEA Florida, Inc. Charter School. For the 2023-24 audit, the auditor shall provide a detailed audit plan and list of all schedules to be prepared by IDEA Florida, Inc. no later than two weeks from the start date of the contract.

2. Fieldwork:

For the 2023-24 audit, the auditor shall complete all field work by August 23,2024..

3. Issuance of Reports and Financial Statement Attestation:

For the 2023-24 audit, the auditor shall have ready for publication all reports denoted in Section II.D of this Request for Proposal by September 13, 2024.



## V. Assistance to Be Provided to the Auditor and Report Preparation

### A. Finance Department Support

The finance department of IDEA Florida, Inc. will be available during the audit to assist the firm by providing information, documentation, and explanations. The preparation of confirmations will be the responsibility of IDEA Florida, Inc.

### B. Work Area, Telephones, Photocopying and Fax Machines

For necessary on-site work, IDEA Florida, Inc. will provide the auditor with reasonable workspace, desks and chairs. The auditor will also be provided with access to telephone lines, photocopying facilities and fax machines at no charge to the auditor.

### C. Report Preparation

The auditor will prepare a draft of the financial statements and related notes. The auditor will provide the draft to IDEA's **Managing Director of Accounting** for review and approval prior to issuance. Proofreading and editing will be the responsibility of the Auditor. Report preparation and printing shall also be the responsibility of the Auditor. The Auditor shall be responsible for providing copies of the annual financial reports to IDEA Florida, Inc.

### D. Non-Confidentiality of Information

IDEA Florida, Inc. reserves the right to retain all copies of vendor proposals submitted in response to this Request for Proposals. You are hereby notified that under FS 119.07, ("Florida's Sunshine Law") proposals submitted in response to this solicitation cannot be granted immunity from public scrutiny. All information submitted must be made available to the public for examination, if so requested. Vendor requests to hold certain submitted materials in confidence cannot be honored. If it is essential to your organization that certain materials are kept confidential, and they are a required element of this Request for Proposal, it is recommended that you decline to respond to this solicitation.

## VI. Proposal Requirements

### A. Submission of Proposals

To be considered, the proposal must be received by IDEA Florida, Inc. by **2:00pm, Central Standard Time, on Wednesday April 17, 2024.**

The Proposal shall be signed by a representative who is authorized to contractually bind the firm.

Any questions by prospective Proposers concerning this RFP shall be addressed in writing through e-mail to [solicitations@ideapublicschools.org](mailto:solicitations@ideapublicschools.org), as soon as possible. No verbal communications shall be binding. All Questions will be answered via Addendum on **April 10, 2024**, and posted in [Public Purchase](#) and on IDEA Florida, Inc. website at <https://ideapublicschools.org/states/florida/>.

Each Proposal shall be prepared simply and economically, providing a straightforward, concise delineation of the firm's capabilities to satisfy the requirements of the Request for Proposal. The emphasis in each Proposal must be on completeness and clarity of content.

### B. Proposal Format

The following material should be submitted for a proposing firm to be considered:

### **1. Title Page:**

Title page showing the Request for Proposals subject; the firm's name; the name, address and telephone number of the contact person, and the date of the proposal.

### **2. Table of Contents**

### **3. Transmittal Letter:**

A signed letter of transmittal briefly stating the proposer's understanding of the work to be done, the commitment to perform the work within the time period, a statement why the firm believes itself to be best qualified to perform the engagement and a statement that the proposal is a firm and irrevocable offer.

### **4. Detailed Proposal:**

The detailed proposal should follow the order set forth in *Section VI.C.* of this Request for Proposal.

## **C. Technical Proposal:**

### **1. General Requirements**

The purpose of the Technical Proposal is to determine the qualifications, competence and capacity of the firms seeking to undertake an independent audit of IDEA Florida Inc.'s Charter Schools in conformity with the requirements of this Request for Proposals. As such, the substance of proposals will carry more weight than their form or manner of presentation. The Technical Proposal should demonstrate the qualifications of the firm and of the particular staff to be assigned to this engagement. It should also specify an audit approach that will meet the request for proposal requirements.

The Technical Proposal should address all the points outlined in the Request for Proposals. While additional data may be presented, the following subjects must be included.

### **2. License to Practice in Florida**

An affirmative statement should be included, indicating that the firm and all assigned supervisory professional staff are properly licensed to practice in Florida and qualified to perform governmental audits.

### **3. Firm Qualifications and Experience**

The Request for Proposal should state the size and structure of the firm's governmental staff, the location of the office from which the work on this engagement is to be performed, background experience of auditing nonprofit clients and the number and level of the professional staff to be employed in this engagement on a full-time basis and the number and level of the staff to be so employed on a part-time basis.

If the firm is a joint venture or consortium, the qualifications of each firm comprising the joint venture or consortium should be separately identified, and the firm that is to serve as the principal auditor should be noted, if applicable.

In a joint Request for Proposal, the principal firm should complete and sign the Request for Proposal Signature Page, and the structure, duties and responsibilities of each firm should be clearly delineated.

Each firm is also required to submit a copy of the report on its most recent peer review, including the related letter of comments and the firm's response to the letter of comments. This should also include a statement whether that peer review included a review of specific local government engagements.

The firm shall also provide information on the results of any federal or state desk reviews or field reviews of its audits during the past three (3) years. In addition, the firm shall provide information on the circumstances and status of any disciplinary action taken or pending against the firm during the past three

(3) years with state regulatory bodies or professional organizations. The firm shall provide an explanation for all pending, local office litigation as well as all litigation related to the firm's audits of State or Local Government entities.

Firm shall also provide a statement of the firm's understanding of the work to be performed, including tax and non-audit services.

#### **4. Partner, Supervisory and Staff Qualifications and Experience**

The firm should identify the principal supervisory and management staff, including engagement partners, managers, other supervisors, and specialists who would be assigned to the engagement and indicate whether each such person is licensed to practice as a certified public account in Florida. The firm also should provide information on the number of years performing government audits as well as the auditing experience of each person, including information on relevant continuing professional education for the past two (2) years and membership in professional organizations relevant to the performance of this audit.

The firm should provide as much information as possible regarding the number, qualifications, experience, and training, including relevant continuing professional education, of the specific staff to be assigned to this engagement. This should include names of partners, audit manager, and field staff who will be assigned to our audit and provide biographies. The firm also should indicate how the quality of staff over the term of the agreement will be assured.

The firm shall provide resumes for partners, audit manager, and field staff who will be assigned to our audit with proposal submission.

#### **5. Similar Engagements with Other Charter Schools**

For the firm's office that will be assigned responsibility for the audit, provide a list of charter School audit engagements performed in the last two years and include the name and phone number of the customer point of contact for each audit engagement.

#### **6. Specific Audit Approach**

The Proposal should set forth a work plan, including an explanation of the audit methodology to be followed, to perform the services required in Section II of this Request for Proposal. In developing the work plan, reference should be made to such sources of information as the IDEA Florida Inc.'s budget and related materials, organization charts, manuals and programs and financial and other management information systems.

Proposers will be required to provide the following information on their audit approach:

- A. Proposed Segmentation of the engagement
- B. Level of staff to be assigned to each proposed segment of the engagement
- C. Type and extent of analytical procedures to be used in the engagement,
- D. Approach to be taken to gain and document an understanding of the IDEA Florida Inc.'s Schools internal control structure
- E. Approach to be taken in determining laws and regulations that will be subject to audit test work
- F. Approach to be taken in drawing audit samples for purposes of testing
- G. Proposed Timeline for fieldwork and final reposting

#### **Identification of Anticipated Potential Audit Problems**

The Request for Proposal should identify and describe any anticipated potential audit problems, the firm's approach to resolving these problems and any special assistance that will be requested from the staff of IDEA Florida, Inc. or their agents.

## D. Price Proposal and Manner of Payment

### 1. Price Proposal

The price proposal should contain all pricing information relative to performing the audit engagement as described in this request for proposals. The total all-inclusive maximum price proposal is to contain all direct and indirect costs including all out-of-pocket expenses. The proposed fee structure should be for the three years of the proposal period, including whatever guarantees can be given regarding increases in future years, and the maximum fee that would be charged. The price shall be expressed as a total price per each fiscal year of the audit, extending out 3 fiscal years, with an annual renewal option beyond 3 years.

Describe billing rates and procedures for technical questions that may come up during the year, or whether these occasional services are covered in the proposed fee structure.

### Price Adjustments

Prices offered shall remain firm through the first three (3) years of the contract. A request for a price adjustment, with proper documentation justifying the adjustment, may be submitted, in writing, 30 days before the third anniversary date of the contract. Price adjustment requests shall be evaluated on an annual basis thereafter. Unit price adjustments must have written approval from IDEA before invoicing. Any unit price adjustment invoiced without written approval from IDEA shall not be paid, and the invoice returned to the Awardee for correction. Requests for price adjustments shall not exceed 3% per adjustment.

### 2. Manner of Payment

Progress payments will be made on the basis of hours of work completed during the course of the engagement.

## E. Price Proposal and Manner of Payment

### 1. References

Firm should include contact information for a minimum of four (4) references with at least two (2) references being comparable nonprofit audit clients. At least one (1) of the references should preferably be a Charter School.

## VII. Evaluation Procedures

### A. Selection of Committee

All responsive Proposals submitted in response to this Request for Proposal will be evaluated by a selection committee. Proposals will be evaluated using the information in accordance with Florida Statute 218.391 and shall include, but are not limited to, ability of personnel, experience, ability to furnish the required services, and such factors may be determined by the audit committee to be applicable to its particular requirements.

### B. Evaluation Criteria

Explanation of Criteria	Max Points	Possible Points
Understanding of task and proposed plan	10	+ 0 to 10
Experience & qualifications of firm <i>Experience with Charter Schools</i> <i>Experience with governmental entities</i>	10	+ 0 to 5 + 0 to 5
Experiences & qualifications of personnel <i>Audit Team</i> <i>Primary Contact</i>	20	+0 to 10 +0 to 10

Time Frames (Timeline)	<b>10</b>	+ 10 <i>(if able to meet 9/13/24)</i> - 20 <i>(if not included)</i>
References	<b>20</b>	+0 to 5 <i>for each positive reference</i> <i>(max 20 points)</i>
Costs <i>(Grand Total Cost for Services must be Provided)</i>	<b>30</b>	See Cost Formula Below

**Cost Proposal:** Price and total long-term cost to IDEA to acquire goods and/or services. **The following formula will be used to determine cost points for scoring when applicable:**

*Formula:*

$(\text{Lowest Proposed Price} / \text{Proposed Price}) \times \text{Assigned Points}$

*Example Price Proposals and scoring results based on a 50-point scale:*

**Proposer Proposed Price Score**

Proposer A \$ 10,000.00 ->  $(\$10,000.00 / \$10,000.00) \times 50 = 50$  pts

Proposer B \$ 10,500.00 ->  $(\$10,000.00 / \$10,500.00) \times 50 = 47.6$  pts

Proposer C \$ 25,000.00 ->  $(\$10,000.00 / \$25,000.00) \times 50 = 20$  pts

## VII. Attachments

Each Respondent is **required** to complete and return the attachments below and include them with their proposal.

- 1. Attachment A: IDEA Florida, Inc. Vendor Packet**
- 2. Attachment B: 38-FLAUDIT-0524 Price Sheet**
- 3. Attachment C: Vendor Questionnaire**
- 4. Attachment D: Proof of Insurance or Bonding**
- 5. Attachment E: RFP Completion Checklist**

## **Attachment A: IDEA Florida Inc. Vendor Packet**

IDEA Florida, Inc. Vendor Packet is on the following pages. Respondent shall complete IDEA Florida Inc.'s Vendor Packet in its entirety, sign, date, and submit with their proposal.



**IDEA Headquarters**  
2115 W. Pike Boulevard  
Weslaco, Texas 78596  
**Phone** 956.377.8000  
**Fax** 956.447.3796

We appreciate your interest in becoming a vendor with IPS Enterprises, Inc. or IDEA Florida Inc. (IDEA entities). Before we can set you or your business up in our software system and do business with you, please fill out and return the vendor packet in its entirety.

Here are a few things to keep in mind:

- Does your business accept purchase orders?
- Do not perform services or fulfill any orders without an approved purchase order in place.
- IDEA Entities are not responsible for materials, supplies or equipment delivered without an approved purchase order.
- IDEA Entities have a 30-day net payment policy.
- IDEA Entities does not pre-pay vendor for goods or services.
- Do not over ship or substitute items from the original purchase order unless pre-approved by the Purchasing or Accounts Payable Supervisors or the Director of Accounting Operations.
- Invoices must be rendered on the date of completed shipment of all materials/items on the purchase order. Separate billing for partial shipments is not allowed unless other arrangements have been done with Accounts Payable Supervisor or Director of Accounting Operations.
- IDEA Entities will verify if your business has been debarred or suspended on [www.sam.gov](http://www.sam.gov)
- IDEA Entities will verify information on your W9 with the IRS website for TIN matching.
- All invoices should be sent to [payableFL@ideapublicschools.org](mailto:payableFL@ideapublicschools.org) for processing.

For questions, please contact:

[ipsvendorinquiry@ideapublicschools.org](mailto:ipsvendorinquiry@ideapublicschools.org)

# Request for Taxpayer Identification Number and Certification

► Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Give Form to the  
requester. Do not  
send to the IRS.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.		
	2 Business name/disregarded entity name, if different from above		
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.		4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any) _____  Exemption from FATCA reporting code (if any) _____  <i>(Applies to accounts maintained outside the U.S.)</i>
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate		
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.		
5 Address (number, street, and apt. or suite no.) See instructions.		Requester's name and address (optional)	
6 City, state, and ZIP code			
7 List account number(s) here (optional)			

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-					
or									
Employer identification number									
				-					

## Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ►	Date ►

## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*





# IDEA Entities

## VENDOR MAINTENANCE FILE

(Check One)

Vendor no. assigned

☐  
☐

New Vendor

Revision to Vendor File

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

Attention: \_\_\_\_\_

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

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip Code \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

**Remit to Address (if different)**

Contact: \_\_\_\_\_

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

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip Code \_\_\_\_\_

Alt. Phone: \_\_\_\_\_

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

### Vendor's Identification Number

☐ Individual's Social Security Number: \_\_\_\_\_ (i.e. 123-45-6789)

☐ Business / Company's Employer I.D. #: \_\_\_\_\_ (i.e. 74-1234567)

CO-OP Member

☐ YES

☐ NO

If YES, which one: \_\_\_\_\_

### We pay this vendor for the following (Check as many as applicable)

Purchase Goods (*Explain Products*) \_\_\_\_\_

☐ Rent Products, Equipment, etc.

☐ Medical Payments

☐ Personal Services (*repairs, consultants, other services etc.*)

☐ Employee Reimbursements

☐ Travel Related (*mileage, meals, hotels, taxi, airfare, conference fees, etc.*)

Form 1099: Box 1

Form 1099: Box 6

Form 1099: Box 7

Requested by: \_\_\_\_\_

*Signature*

\_\_\_\_\_

*Date*

### Business Office Use Only

This form must be filled out by IDEA employees, NOT by vendors.

**\*TYPE OR PRINT\***

Signature

Date

Posted by

1099 Vendor: ☐ YES ☐ NO

IF YES: 1099 BOX NO. \_\_\_\_\_

Vendors will not be added on system without an email or phone number provided.

All sections of this form must be filled out in order to process.

**Turn in forms to Purchasing Department**

[ipsvendorinquiry@ideapublicschools.org](mailto:ipsvendorinquiry@ideapublicschools.org)



## ACH Vendor Payment Enrollment Form

(Only for use with banks within the United States)

This form authorizes IDEA Entities to make payments to a business or individual electronically. It is the responsibility of the vendor to notify IDEA Public Schools of pertinent payee or company information and/or bank account changes verbally and in writing. IDEA Public Schools shall be entitled to rely on the authorization herein until it receives 45 days written notice of any change from the vendor. This form is required as IDEA Public Schools is going paperless. **Please type or print.**

### Section 1: Payee / Company Information

Vendor Name: \_\_\_\_\_

Social Security Number or Employer Identification Number: \_\_\_\_\_

Phone Number (s): \_\_\_\_\_

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

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

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

*(Email is mandatory to send payment notification to vendor when payments are initiated by IDEA Accounts Payable Department via Tyler Munis ERP system.)*

### Section 2: Account Information (For Accuracy Provide Voided Check)

☐

Personal Account

☐

Business Account

Bank Name: \_\_\_\_\_

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

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Bank Routing Number: \_\_\_\_\_ (must be 9 digits)

Vendor Bank Account Number: \_\_\_\_\_ ☐ Checking ☐ Savings

### Section 3: Authorization

Authorized Signature

Print Name

Title

Date

### Section 4: Submit Information to

IDEA Public Schools Headquarters  
2115 W. Pike Blvd  
Weslaco, TX 78596  
Phone: 956-377-8000  
Fax: 956-447-3796

OR

Email:

[ipsvendorinquiry@ideapublicschools.org](mailto:ipsvendorinquiry@ideapublicschools.org)



**IDEA Headquarters**  
2115 W. Pike Boulevard  
Weslaco, Texas 78596  
**Phone** 956.377.8000  
**Fax** 956.447.3796

## IDEA Florida Inc. Conflict of Interest Form

**By signature of this Proposal, Vendor provides, covenants and affirms that:**

- Name and corporate structure of vendor.  

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- If your business entity does not have any officer, partner, director, or proprietor or such officer or employee or the officer's or employee's spouse or child, or any combination of them, with a material interest (5% or more ownership), and a family relationship to the third degree with any IPS or IDEA Florida employees or officers or board members – Write N/A 

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- If your business entity has any officer, partner, director, or proprietor or such officer or employee or the officer's or employee's spouse or child, or any combination of them, with a material interest (5% or more ownership), and a family relationship to the third degree with any IPS or IDEA Florida employees or officers or board members. List the name of the IDEA employee, officer or board member there is a relationship with and the relationship to that person.  

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- No manager, or employee or paid consultant of Vendor is a member of the IDEA Public Schools' Board of Directors, IDEA Florida Inc.'s Board of Directors or an employee of IPS Enterprises Inc. or IDEA Florida Inc.
- No manager or employee or paid consultant of Vendor is married to a member of the IDEA Public Schools' Board of Directors, IDEA's Chief Executive Officer, or an employee of IDEA.
- No member of the IDEA Public Schools' Board of Directors, IDEA's Chief Executive Officer, or employee of IDEA is a manager or paid consultant of Vendor.
- Neither any member of the IDEA Public Schools' Board of Directors, IDEA Florida Inc.'s Board of Directors, IDEA's Chief Executive Officer, nor any employee of IDEA owns or controls more than 5% in Vendor.
- Vendor has disclosed within the Proposal any interest, fact or circumstance which does or may present a potential conflict of interest.

- Should Vendor fail to abide by the foregoing covenants and affirmations regarding conflicts of interest, Vendor shall not be entitled to the recovery of any costs or expenses incurred in relation to any contract with IDEA Public Schools and shall immediately refund to IDEA any fees or expenses that may have been paid under the contract and shall further be liable for any costs incurred or damages sustained by IDEA \ relating to that contract.
- Some but not all of the relationships described above may be disqualifying for vendors.

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Vendor Name

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Signature of Authorized Representative

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Date

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Printed Name and Title of Authorized Representative

**If you have any questions, please contact:**

**[ipsvendorinquiry@ideapublicschools.org](mailto:ipsvendorinquiry@ideapublicschools.org)**

## Jessica Lunsford Background Screening Compliance

**Introduction:** Florida Law, the Jessica Lunsford Act, requires a vendor who will have employees present on charter school property to undergo a Level II background screening, which consists of an FDLE/FBI search if vendor representatives will be at a school when students are present, have direct contact with students, or have access to or control of school funds. If no personnel will meet any of the three criteria, the law does not apply and no action will be needed. For vendors providing services to charter schools in the Hillsborough District, more information may be found at [www.sdhc.k12.fl.us/Procurement/JessicaLunsfordAct.asp](http://www.sdhc.k12.fl.us/Procurement/JessicaLunsfordAct.asp).

Each vendor will be required, at its own cost, to comply with the background screening and badging requirements prior to providing services and provide proof of compliance.

### Criminal History Review of Contractor Employees

**Please complete the information below:**

I, the undersigned agent for Vendor, certify that [check one]:

☐ None of the employees of Vendor and any subcontractors are “covered employees” as defined above. If this box is checked, I further certify that Vendor has taken precautions or imposed conditions to ensure that the employees of Vendor and any subcontractor will not become covered employees. Vendor will maintain these precautions or conditions throughout the time the contracted services are provided.

**OR**

☐ Some or all of the employees of Vendor and any subcontractor are “covered employees.” If this box is checked, I further certify that:

1. Vendor has complied with all the requirements of the Jessica Lunsford act as required by law.
2. If Vendor receives information that a covered employee subsequently has a reported criminal history, Vendor will immediately remove the covered employee from contract duties and notify IDEA in writing within three business days.
3. Upon request, Vendor will provide IDEA, the school district or its agents with the name and any other requested information regarding covered employees so that IDEA may obtain criminal history record information on the covered employees.
4. If IDEA objects to the assignment of a covered employee on the basis of the covered employee’s criminal history record information, Vendor agrees to discontinue using that covered employee to provide services to IDEA.
5. All covered employees hired after January 1, 2008 have completed the required background check process prior to performing any duties related to IDEA or having any direct contact with students.

I understand that non-compliance with this certification by Vendor may be grounds for contract termination and/or barring disqualified persons from performing the work.

\_\_\_\_\_  
Vendor Name

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name and Title of Authorized Representative

## Vendor Certification

**Public Entity Crimes:** Vendor certifies, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction per the provisions of Florida Statute 287.133 (2) (a).

**Initial:** \_\_\_\_\_

**Federal Debarment Certification:** Vendor and its principals agree that it is in compliance with the Federal Debarment Certification, as required by Executive Order 12549, Debarment and Suspension, and implemented at 34 CFR, Part 85, as defined at the 34 CFR Part 85, Sections 85.105 and 85.110- (ED80-0013).

**Initial:** \_\_\_\_\_

**Fair Labor Standards Acts - “Hot Goods”:** Vendor certifies that goods/services are, or will be, produced in compliance with all applicable requirements of sections 6, 7, and 12 of the Fair Labor Standards Act, as amended, and of regulations and orders of the United States Department of Labor issued under section 14 thereof.

**Initial:** \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## Equal Opportunity and Nondiscrimination

Vendor promotes employment opportunity through a program designed to provide equal opportunity without regard to race, color, sex, religion, national origin, age, disability, or political affiliation or belief. Additionally, discrimination is prohibited against any beneficiary of programs funded under Title I of the Workforce Investment Act of 1998, on the basis of the beneficiary's citizenship/status as a lawfully admitted immigrant authorized to work in the United States, or his/her participation in any WIA Title I financially assisted program or activity. Vendor conforms to all applicable federal and state laws, rules, guidelines, regulations, and provides equal employment opportunity in all employment and employee relations.

## EEO Laws, Rules, Guidelines, Regulations

Vendor provides equal opportunities consistent with applicable federal and state laws, rules, guidelines, regulations, and executive orders. Such regulations include:

- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination under any program or activity receiving federal financial assistance.
- Title VII of the Civil Rights Act of 1964, as amended, and its implementing regulations at 29 CFR Part 37 which prohibit discrimination based on race, color, religion, sex, or national origin in any term, condition or privilege of employment.
- Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals because of disability.
- Age Discrimination in Employment Act of 1967 as amended, which prohibits discrimination against individuals 40 years of age and older.
- Americans with Disabilities Act of 1990, which prohibits discrimination against qualified individuals with disabilities.
- Age Discrimination Act of 1975, as amended, which prohibits discrimination based on age in programs receiving federal financial assistance.
- Texas Commission on Human Rights Act, as amended, which prohibits discrimination in employment based on race, color, handicap, religion, sex, national origin, or age.
- Equal Pay Act of 1963, as amended, which requires equal pay for men and women performing equal work.
- Pregnancy Discrimination Act of 1978, which prohibits discrimination against pregnant women.

Vendor is committed to promoting equal employment opportunity through a progressive program designed to provide equal opportunity without regard to race, color, sex, religion, national origin, age, disability, or political affiliation or belief. Vendor takes positive steps to eliminate any systematic discrimination from personnel practices. Vendor recruits, hires, trains, and promotes into all job levels the most qualified persons without regard to race, color, religion, sex, national origin, age, or disability status. Staff at all levels is responsible for active program support and personal leadership in establishing, maintaining, and carrying out an effective equal employment opportunity program.

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Vendor Name

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Signature of Authorized Representative

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Date

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Printed Name and Title of Authorized Representative

## Contract Provisions for Contracts Involving Federal Funds

With respect to the use of federal funds for the procurement of goods and services, 2 CFR 200.326 and Appendix II to 2 CFR 200 require the inclusion of the following contract provisions.

1. Remedies for Contract Breach or Violations. Contracts for more than the simplified acquisition threshold currently set at \$150,000 must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms and provide for such sanctions and penalties as appropriate.
2. Termination for Cause and Convenience. All contracts in excess of \$10,000 must address termination for cause and for convenience by THE SCHOOL including the manner by which it will be effected and the basis for settlement.
3. Equal Employment Opportunity. Except as otherwise provided under 41 CFR 60, all contracts that meet the definition of “federally assisted construction contract” in 41 CFR 60–1.3 must include the equal opportunity clause provided under 41 CFR 60–1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 CFR 1964–1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 CFR 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”
4. Davis-Bacon Act. When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by the school and the charter districts must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141–3144, and 3146–3148) as supplemented by Department of Labor regulations (29 CFR 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The school and the charter districts must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The school and the charter districts must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The school and the charter districts must report all suspected or reported violations to the Federal awarding agency.
5. Contract Work Hours and Safety Standards Act. Where applicable, all contracts awarded by the school and the charter districts in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or



articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

6. Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of “funding agreement” under 37 CFR 401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 CFR 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.
7. Clean Air Act and the Federal Water Pollution Control Act. Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the contractor to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401–7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251–1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).
8. Energy Efficiency Standards and Policies. Mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. 6201).
9. Debarment and Suspension. A contract award (see 2 CFR 180.220) must not be made to parties listed on the governmentwide Excluded Parties List System in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR Part 1986 Comp., p. 189) and 12689 (3 CFR Part 1989 Comp., p. 235), “Debarment and Suspension.” The Excluded Parties List System in SAM contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.
10. Byrd Anti-Lobbying. Contractors that apply or bid for an award of \$100,000 or more must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier.
11. Procurement of Recovered Materials. The school, the charter districts and their contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired by the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

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Signature

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Date

## Certification Regarding Lobbying

Submission of this certification is a prerequisite for making or entering into this transaction and is imposed by section 1352, Title 31, U.S. Code. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Any person who fails to file the required certifications shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The undersigned certifies, to the best of his or her knowledge and belief, that:

No Federal appropriated funds have been paid or will be paid by or on behalf of the undersigned, to any person for influencing or attempting to influence an office or employee of any agency, a Member of Congress, or an officer or employee of Congress, an employee of a Member of Congress, or any Board Member, officer, or employee of IDEA Public Schools in connection with the awarding of Federal contract, the making of a Federal grant, the making of a Federal Loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.

If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, an employee of a Member of Congress, or any Board Member, officer, or employee of IDEA Public Schools in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form –LLL, “Disclosure Form to Report Lobbying”, in accordance with its instructions.

The undersigned shall require that the language of this certification be included in the awarded documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and that all sub-recipients shall certify and disclose accordingly.

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Vendor Name

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Signature of Authorized Representative

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Date

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Printed Name and Title of Authorized Representative

## Debarment or Suspension Certificate

IDEA Florida Inc. is prohibited from contracting with or making sub-awards under covered transaction to parties that are suspended or debarred or whose owners/members/principals and certain employees are suspended or debarred. Vendor must certify that it and its owners/members/principals are not suspended or debarred under federal law and rule.

By submitting signing contract and this certificate, Vendor certifies that no suspension or debarment is in place, which would otherwise preclude Vendor or its Owner/Members/Principals or employees from receiving a federally funded contract under applicable federal regulations and federal OMB Circulars.

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Vendor Name

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Signature of Authorized Representative

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Date

## Attachment B: 38-FLAUDIT-0524 Price Sheet

Respondent shall provide pricing information referencing "Attachment B: 38-FLAUDIT-0524 Price Sheet" in its submitted proposal. "Attachment B: 38-FLAUDIT-0524 Price Sheet" may be downloaded at IDEA Florida Inc.'s website <https://ideapublicschools.org/states/florida/>.

### Attachment B

IDEA Florida, Inc. Professional Auditing Services  
Request for Proposal #38-FLAUDIT-0524 Price Sheet



Item	Contract Year Ending June 30	Financial Audit and Statements	Tax Return (Form 990)	Total Cost
1	2024	\$ -	\$ -	\$ -
2	2025	\$ -	\$ -	\$ -
3	2026	\$ -	\$ -	\$ -
Total		\$ -	\$ -	\$ -

#### Information

\* Cost should include Major Programs (Child Nutrition Program, ESSER, School of Hope)

\*Requested pricing is based off of School Projections Found in Table 2 of the Solicitation Document and is subject to change.

\*Cost should factor in the 4 reports referenced in Section II - Nature of Services Required, Section D for each county.

#### ACCEPTANCE OF PROPOSAL

By Signing this Bid Sheet you agree to and acknowledge the Scope of Work and Terms and Conditions stated in the provided Solicitation Document.

Payment for services rendered will be made as specified.

AUTHORIZED CLIENT SIGNATURE		DATE OF ACCEPTANCE (mm/dd/yyyy)
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## Attachment C: Vendor Questionnaire

All questions must be answered and submitted with respondent's proposal.

1. Please describe the types of auditing services your company has provided to charter schools in the **State of Florida**. Please explain.

If no charter school experience, please describe the types of auditing services your company has provided to non-profits in the **State of Florida**.

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2. Please describe the types of auditing services your company has provided to charter schools in **Hillsborough, Duval, and Polk counties**. Please explain.

If no charter school experience, please describe the types of auditing services your company has provided to non-profits in **Hillsborough, Duval, and Polk counties**.

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3. Does your company have experience conducting auditing services related to Governmental Accounting Standard Board (GASB)? Please explain.

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4. How many audits has your company done related to the Governmental Accounting Standard Board (GASB)? Please explain the extent of those audits.

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5. Is your company able to meet the timeline of 9/13/24 as specified in the RFP? If not, please explain.

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## Attachment D: Proof of Insurance or Bonding

Please provide proof of insurance or bonding for each individual state included in this RFP as applicable. IDEA requires the minimum insurance coverage & limits as stated below:

MINIMUM INSURANCE COVERAGE & LIMITS FOR VENDORS AND PROFESSIONAL SERVICE PROVIDERS			
Type of Contractor	Required Coverage	Required Coverage Limits	Other
Vendor General Insurance Requirements	Commercial General Liability	Each Occurrence: \$1,000,000  General Aggregate: \$2,000,000  Personal and Advertising Injury: \$500,000	Additional Insured Endorsement
	Automobile Liability Including: <input type="checkbox"/> Owned Vehicles <input type="checkbox"/> Non-Owned Vehicles <input type="checkbox"/> Hired Vehicles <i>(Required for vehicles driven on school property)</i>	Combined Single Limit: \$1,000,000	
	Workers' Compensation* Employers' Liability	Limit: State- Statutory  Each Occurrence \$500,000	Waiver of Subrogation  Endorsement

For the contractor categories below, the following coverages may apply in addition to the general insurance requirements listed above:

Professional Services (accountants, architects, attorneys, education consultants, etc.)	Professional Liability	General Aggregate:	Additional Insured Endorsement
		Each Occurrence:	
		Abuse of Molestation (If applicable)	
		\$2,000,000	
		\$1,000,000	
		\$1,000,000	

## Attachment E: RFP Completion Checklist

- ☐ Complete RFP package reviewed, signed, and dated
- ☐ Transmittal Letter included
- ☐ Information on the circumstances and status of any disciplinary action taken or pending against the firm during the past three (3) years with state regulatory bodies or professional organizations and explanation for all pending, local office litigation as well as all litigation related to the firm's audits of State or Local Government entities (if applicable) included
- ☐ Results of any federal or state desk reviews or field reviews of vendor's audits during the past three (3) years included
- ☐ Affirmative statement included
- ☐ Specific audit approach included
- ☐ List of principal supervisory and management staff, including engagement partners, managers, other supervisors, and specialists who would be assigned to the engagement and indicate whether each such person is licensed to practice as a certified public account in Florida.
- ☐ Resumes for partners, audit manager, and field staff who will be assigned to audit included
- ☐ Minimum of four (4) references with at least two (2) references being comparable nonprofit audit clients and at least one (1) of the references preferably be a Charter School included
- ☐ IDEA Florida Inc. Vendor Packet completed, signed, dated, and included
- ☐ "Attachment B: 38-FLAUDIT-0524 Price Sheet" completed and included
- ☐ Vendor Questionnaire completed and included
- ☐ Proof of insurance or bonding included

**End of IDEA Florida, Inc. RFP**