

BLUE MOUNTAIN TRANSLATOR DISTRICT

**REQUEST FOR PROPOSALS 2020-4
2019-2020 Fiscal Year Audit**

**Date Due: 8/19/20
Time Due: 12:00PM**

**Blue Mountain Translator District
PO Box 901
La Grande, Oregon 97850**

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Advertisement

**BlueMountain Translator District
2019-2020 Fiscal Year Audit**

REQUEST FOR PROPOSALS

The Blue Mountain Translator invites qualified firms to submit proposals to perform an audit of the 2019-2020 Fiscal Year based upon the scope of work contained in the Request for Proposals. The intent is to select one individual or firm to provide services with the probable exception of bond counsel services. Sealed proposals, in writing, will be received by Alex McHaddad, Executive Director, PO Box 901, La Grande, Oregon 97850, until filled. Facsimile or electronically transmitted proposals will not be accepted.

The complete Request for Proposals is on file with and may be obtained from Alex McHaddad at 1108 K Ave., La Grande, OR, or by e-mail at bmtd.org@gmail.com, or by calling 541-963-0196. The Request for Proposal can also be obtained from the Blue Mountain Translator District's website www.bmtd.org.

The Blue Mountain Translator District's programs, services, employment opportunities, and volunteer positions are open to all persons without regard to race, religion, color, national origin, sex, age, martial status, handicap, or political affiliation.

SECTION I GENERAL INFORMATION

1-1 Request for Proposal

BMTD seeks to have an independent audit conducted for the 2019-2020 Fiscal Year.

1-2 Compliance with Rules

Proposers responding to this RFP must follow the procedures and requirements stated within this RFP. Except as otherwise provided in this RFP, the applicable provisions of Oregon Administrative Rules Chapter 137, Division 47, shall apply to all personal service contracts of the Blue Mountain Translator District. Adherence to these rules and the procedures and requirements of this RFP will ensure a fair and objective analysis of your proposal. Failure to comply with or complete any part of this RFP may result in rejection of your proposal.

1-3 Schedule of Request for Proposal Events

RFP Advertised	Date
Proposal Due Date & Bid Opening	8/19/2020; 8/20/2020
Pre-Conference with Selection Panel	Following Submission
Finalist Interviews with Board of Directors	Following Pre-Conference
Final Board Approval	Following Finalist Interviews

I-4 Official Contacts

Questions regarding the scope of services must be directed to:

Alex McHaddad, Executive Director
Blue Mountain Translator District
PO Box 901
La Grande, OR 97850
Phone: 541-963-0196
Email Address: bmtd.org@gmail.com

I-5 Proposal Due Date

One (1) original and Two (2) copies of the proposal must be delivered to Alex McHaddad, Blue Mountain Translator District, PO Box 901, La Grande, Oregon. 97850, no later than 8/19/2020 at 12:00PM, local time. Proposals should be marked "RFP for 2019-2020 Fiscal Year Audit." An electronic copy should be sent by email to bmttd.org@gmail.com. Facsimile transmitted proposals will not be accepted. Late proposals will be kept by the District, but not considered for award. Proposals must be sealed and clearly addressed and marked with the RFP title.

I-6 Proposal Withdrawal

Any proposal may be withdrawn at any time. A duly authorized representative of the firm shall execute the request. Withdrawal of a proposal will not prejudice the right of the proposer to file a new proposal.

I-7 Pre-Proposal Conference

Firms providing proposals will be entitled to discuss the RFP with a Selection Panel comprised of the Executive Director and two Directors.

I-8 Cancellation, Delay or Suspension of Solicitation; Rejection of Proposals

The District may cancel, delay or suspend this solicitation if in the best interest of the District as determined by the District. The District may reject any or all proposals, in whole or in part, if in the best interest of the District as determined by the District. The District reserves the right to reject any or all proposals not in compliance with public bidding procedures.

I-9 Irregularities

The District reserves the right to waive any non-material irregularities or information in the RFP or in any proposal.

I-10 Multiple Contracts

The intent is to select one individual/firm to provide all services. The District reserves the right to contract out services to more than one firm depending on geographic reach of operations.

I-11 Incurred Costs

The District is not liable for any costs incurred by a proposer in the preparation and / or presentation of a proposal. The District is not liable for any cost incurred by a proposer in protesting the District's selection decision.

I-12 Ownership of Documents

Any material submitted by a proposer shall become the property of the District. Materials submitted after a contract is signed will be subject to the ownership provision of the executed contract.

I-13 Confidentiality of Information

All information and data furnished to the proposer by the District and all other documents to which the proposer's employees have access during the preparation and submittal of the proposal shall be treated as confidential to the District. Any oral or written disclosure to unauthorized individuals is prohibited.

I-14 Public Record

All proposals and information submitted by proposals are not open for public inspection until after the notice of intent to award a contract is issued. Except for exempt materials, all proposals and information submitted by proposers will be available for viewing after the evaluation process is complete and the notice of intent to award is sent to all participating parties.

I-15 Equal Opportunity Policy For Contractors

The Blue Mountain Translator District requires all Proposers to comply with equal opportunity policies. The Blue Mountain Translator District's programs, services, employment opportunities, and volunteer positions and contracts are open to all persons without regard to race, religion, color, national origin, sex, age, marital status, handicap, or political affiliation. A copy of the District's policy is available upon request.

I-16 Independent Contractor

The individual or firm shall be recognized by both parties as an “independent contractor(s).” All persons employed by the firm to furnish services in accordance with any contract resulting from this RFP will be employees (or subcontractors) of the firm and not the District.

I-17 Professional Liability Insurance

Professional Liability Insurance covering any damages caused by an error, or omission or any negligent acts by the Contractor. Combined single limit per occurrence shall not be less than \$300,000 as provided by the OSB Professional Liability Fund, Primary Coverage Plan.

SECTION II PROPOSAL FORM AND CONTENT

II-I Proposal Submittal

Proposals shall be prepared simply and economically, providing a straightforward, concise description of the proposer's capabilities to satisfy the requirements of the RFP, and should be easily reproducible. Emphasis should be on completeness and clarity of content and cost effectiveness of the proposal.

All pages of the proposal must be numbered consecutively. The proposal shall not exceed fifteen (15) pages in length. Resumes and licenses shall not count against this page limit. The proposal must be organized in accordance with the list of proposal contents.

II-2 Proposal Form and Content

Proposals should include the following items in their proposals addressing the scope of work in Section IV. All items must fall within the maximum page count. Proposal and cost schedule shall be valid and binding for sixty (60) days following the proposal due date and will become part of the contract that is negotiated with the District.

1. Letter of Transmittal

All proposals must include a cover letter addressed to Alex McHaddad, Executive Director, and signed by a duly constituted official legally authorized to bind the applicant to both its proposal and cost schedule. The cover letter must include name, address, and telephone number of the proposer submitting the Proposal and name, title, address, telephone number, and email address of the person, or persons to contact who are authorized to represent the proposer and to whom correspondence should be directed.

2. Table of Contents

Include a clear identification of the material by section and by page number.

3. Executive Summary

The proposer may use this section to introduce the Proposal or to summarize the key provisions of the Proposal. Provide a statement describing why you are qualified to perform this work.

4. Statement of Understanding

The proposer shall include a detailed statement of understanding of the Project to be provided. If there are services listed in this RFP that you will not be able to provide, describe those services in this section.

Also, provide detailed billings, per District restrictions.

5. Proposed Firm and Qualifications

- a. Describe your background and history; include number of years in business and scope of services.
- b. Describe your services.
- c. Provide a statement describing the capability of your firm to respond to time-sensitive or short notice requests and / or complicated issues.
- d. If applicable, provide at least two examples of performing audits.
- e. Provide the date you would be able to begin performing an audit.

6. References

Provide contact information for three clients, current and / or prior, so reference checks can be conducted.

7. Additional Information

Any other information that the proposer feels applicable to the evaluation of the Proposal or of their qualification for accomplishing the services should be included in this section. You may use this section to address those aspects of your services that distinguish your firm from other firms.

8. Fee Schedule

- a. Provide Standard Prices of Commissions for services.

**SECTION III
EVALUATION / SELECTION OF PROPOSALS**

III-1 Evaluation Criteria

The following information will be taken into consideration during the evaluation process:

- a. Meets qualifications identified in the Request for Qualifications and Proposals.
- b. Included complete and clear responses to items in the Content of Response section.
- c. Demonstrates pedigree in performing audits.
- d. Demonstrated expertise in the following areas as it relates to municipalities;
 - 1) Performing audits.
- e. Adequate local facilities, available support staff, and range of services offered.
- f. Demonstration of workload capacity and a level of experience commensurate with the level of service required by the District.
- g. The professional reputation for providing high-quality services, ability to work cooperatively with Board of Directors, Executive Director, and independent contractors.
- h. Proposer is bonded.
- i. Results of interview.

III-2 Clarifications

The District reserves the right to seek clarification of each proposal submitted. The District also reserves the right to require other evidence of technical, managerial, financial, or other abilities prior to selection.

III-3 Interviews

In connection with the evaluation, the Proposer will conference with the Selection Panel consisting of two Directors and the Executive Director. However, a Proposer may choose simply to meet with the Board of Directors. Board interviews should be conducted in Executive Session.

III-4 Method of Selection

The Board of Directors and Executive Director will review the submitted proposals. After review, they may select finalists for interviewing and choose a finalist. After completing negotiations and contract process, the Board of Directors shall award a contract. The Firm serves in accordance with the contract. The successful Proposer will be the one(s) that in the judgment of the Board of Directors best demonstrates the ability to cover the broadest range of services that includes the assigned tasks and any combination of the specialized services currently provided by outside firms, in a cost-effective manner.

III-5 Notice of Intent to Award

Upon completion of the evaluation process, the Executive Director will advise the proposers of its number one selection.

III-6 Agreement

The contract will define the extent of services to be rendered, method and amount of compensation.

When an agreement is reached, a contract for the work will be prepared and executed upon the Board of Directors approval. The successful proposer agrees to enter into a contract with the District. The District reserves the right to negotiate a final contract that is in the best interest of the District.

SECTION IV BACKGROUND AND SCOPE OF WORK

Background: Blue Mountain Translator District is a local government special district. The Board of Directors seeks to conduct an audit of the 2019-2020 Fiscal Year.

Purpose of Request for Proposals: BMTD seeks a qualified CPA firm to conduct an independent audit for the 2019-2020 fiscal year.

Services to be provided:

- Perform an audit for the 2019-2020 Fiscal Year.