



REQUEST FOR PROPOSAL

Fixed Assets Inventory – RFP #2024-101

Invitation to Submit Proposal

The Jefferson County School Board (hereinafter, “JCSB”) invites qualified firms to submit proposals to conduct a Fixed Asset Inventory prior to May 31, 2024. The goal of this project is to establish a baseline of all JCSB fixed assets with an original purchase value of \$5,000 or more and including all Information Technology items. Annual renewals for five (5) consecutive fiscal years beginning with fiscal year ending June 30, 2024, through fiscal year ending June 30, 2029, will be considered after the original project is complete.

Any inquiries regarding the school district or this invitation should be directed to:

Taryn Bellflower
Executive Assistant to Superintendent
1490 W. Washington Street
Monticello, FL 32344
Phone: 850-342-0100
tbellflower@jeffersonschools.net

Submission Schedule

Request for Proposal Issued	Friday, February 16, 2024
RFP Question Deadline	Friday, February 23, 2024
Proposals Due	Friday, March 1, 2024
Proposal Evaluations (Technical and Financial)	Wednesday, March 6, 2024
Vendor Interviews (if needed)	TBD
Recommendation to the School Board for Contract Award	Monday, March 18, 2024
Respondent Notification of Contract Award	Tuesday, March 19, 2024

Table of Contents

Instructions for Submission of Request for Proposal	3
Background Information	3
Evaluation Process	4
Vendor Interviews	4
Scope of Project	6
Access to Facilities	7
Additional Provisions	8
Proposal Content and Format	9
Fee Structure	9
General Terms & Conditions	10
Offeror Affirmation Form	11
Offeror Information Form	12
Financial Response Form	13
Non-Submittal Response Form	14
Solicitation Checklist	15

Instructions for Submission of Request for Proposal (RFP)

All proposals must be received at the above address no later than:

Friday, March 1, 2024, at 12:00 PM EDT

Please submit your sealed response, labeled "JCSB RFP #2024-101" to the Finance Department Office at the address listed above. Late and/or incomplete responses will be disqualified. Section I (Company Qualifications/Experience and Methodology/Operations) and Section II (Pricing) must be labeled and submitted in separate sealed envelopes labeled "Section I" and "Section II".

Section I. Company Qualifications/Experience and Methodology/Operations: Submit three (3) copies of all related documents.

Section II. Pricing: Submit three (3) copies of the Bid Form and supporting documentation of the Firm's fee structure.

JCSB reserves the right to reject any and all proposals submitted and to request additional information from all proposers. Any contract awarded will be awarded to the vendor, who based upon evaluation of all proposals, is determined to have submitted the best proposal, considering both technical and cost factors. JCSB will not pay any vendor any cost incurred in making their proposal or presentations or for any information learned in the course of the selection process.

Background Information

The Jefferson County School Board is a political subdivision of the State of Florida and is officially governed by the Board of Education, comprised of five members elected by the people. They serve four-year terms and are elected by districts on a staggered basis. JCSB employs approximately 175 employees who work in 6 building locations in Monticello, Florida, JCSB educates approximately 745 students.

Evaluation Process

Administration will evaluate based on Technical and Financial attributes:

1. Responsiveness of the proposal in clearly stating the understanding of the work to be performed and in demonstrating the intention and ability to perform the work.
2. The vendor's experience in conducting fixed assets inventories of similar nature, size, and complexity, and the vendor's commitment to maintaining technical expertise in government and K-12 environments.
3. Technical experience and professional qualifications of the vendor.
4. Cost will be considered as a factor in the award.
5. JCSB reserves the right to award the contract based on what it determines to be in the best interests of JCSB.

A. Technical Evaluation:

Category	Percent
1. Responsiveness of the Proposal	10%
2. Experience in Government & K-12 Environments	40%
3. Technical Experience & Professional Qualifications of the Firm	50%
Total	100%

Up to 100% can be awarded per evaluator for the technical portion of the proposal. Evaluators will assign a score of 0% (lowest) to 100% (highest) in each category.

B. Financial Evaluation:

Category	Percent
Lowest Fees	100%

The Financial proposal with the lowest fees is awarded the full 100%.

Vendor Interviews

Depending on the outcome of the Technical and Financial Evaluation, Vendors may be asked to meet with JCSB personnel to provide a presentation which consists of the solution that was proposed in the RFP response, benefits of the proposal submitted, and a working demonstration of the solution. If selected for an interview, Vendor(s) will be notified via email within three (3) business days following the Proposal Evaluation Date.

Scope of Project

The scope of the work described below contains the minimum requirements of the contract to be awarded for the solicitation. Any deviations from these specifications shall be listed on a separate page titled "Deviations from Specifications."

1. This project will set a standard for inventory control of equipment acquired in future years and lay the groundwork for developing stronger inventory policies and procedures.
2. The vendor will work with JCSB Technology department to establish an initial technology inventory, to be reconciled yearly moving forward.
3. JCSB will provide a copy of all assets currently on file to the winning proposal for inventory and reconciliation.
4. JCSB is requesting inventory for the following sites:

School/Facility	Location
District Office	1490 W. Washington Ave, Monticello, FL
Jefferson K-12 School	50 David Rd, Monticello, FL
Turning Point Alternative School	575 S. Water St, Monticello, FL
Adult Education Campus	579 S. Water St, Monticello, FL
Maintenance Facility	620 S. Water Street, Monticello, FL
Transportation Facility	1780 S. Jefferson Street, Monticello, FL

5. Vendor will perform all labor to conduct a comprehensive inventory at JCSB site locations. All the following information will be captured for each item during the inventory process.
 - Asset Tag Number (barcode)
 - Asset Category
 - Manufacturer
 - Model
 - Serial Number
 - Description
 - Quantity (if applicable)
 - Inventory Date
 - Site
 - Building
 - Room
 - Employee the Asset is Issued to (when applicable)
6. Asset Tagging: Vendor will provide asset tags (subject to JCSB approval).
 - Vendor and JCSB will standardize tag placement locations on items.
 - Vendor will remove current tags and affix a new tag on each item on the Asset List provided by JCSB.
 - Any items identified to not be on the asset list will be tagged and notated accordingly.
 - Any items on the asset list that are unable to be located will be notated accordingly.
7. Vendor will remedy any discrepancy reported by JCSB. For this project, a discrepancy is defined as an item incorrectly entered into the asset management system by vendor staff or items that JCSB reasonably feels the vendor missed at site locations.

Access to Facilities

JCSB will provide the following:

1. Contact information: site representative, address and phone number for each location.
2. Sitemaps for each location.
3. JCSB will schedule and coordinate vendor team visits for each school site and JCSB facility location. Inventory services will take place after school hours as scheduled for school sites; and during normal business hours for offices and departments where students are not typically present.
4. Vendor personnel will identify themselves upon arrival and follow all security protocols in place at each facility.

Additional Provisions

- A. The vendor shall be an independent contractor and their officers, agents, and employees shall not be deemed officers, agents, or employees of JCSB.
- B. The vendor shall not assign or transfer or subcontract this agreement, any interest therein, or claim thereunder without the prior written approval of JCSB.
- C. JCSB may terminate any resulting contract, in part or in whole, without penalty, upon 30 days written notice to the vendor. Any contract cancellation notice shall not relieve the vendor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of the cancellation. In the event of termination by mutual agreement, the vendor shall be compensated for all hours worked at the specified contractual rate.
- D. The vendor shall be required at all times during the term of this agreement to subscribe to and comply with the Workers' Compensation laws of the State of Florida and to save harmless JCSB from any and all liability from or under said act.
- E. Vendors contracting with the State of Florida (or entities thereof as defined in the Act) further certify that they will comply with the Drug-Free Workplace Act.
- F. JCSB operates all of its schools and offices as smoke-free work places. The vendor agrees to abide by smoking restrictions in place for the offices and locations where the vendor will work under the terms of this contract.
- G. Except as otherwise provided by law or rule, vendor agrees not to publish or distribute any information concerning work done for JCSB.

Proposal Content & Format

- A. **Title Page:** Include the RFP subject, the name of your firm, address, contact numbers, name of contact person and date.
- B. **Table of Contents:** Include a table of contents identifying the material by section and page number.
- C. **Letter of Transmittal**
 - 1. Briefly state your understanding of the requested services and describe the processes used to reach the objective.
 - 2. List the person(s) who are authorized to make representations for your firm. Include their titles, addresses, email addresses and phone numbers.
- D. **Profile of the Firm**
 - 1. Provide a brief overview of your firm to include size, type (national, regional, local, etc.), and location of the office from which the work is to be done.
 - 2. List current or former clients with engagements similar to the engagement described in this RFP. Indicate the scope of work, date, total hours, and the name and telephone number of the client contact.
- E. **Services to be Provided.**
 - 1. Express agreement to meet the requirements of the engagement as stated in the "Scope of Project" section of this RFP.
 - 2. Provide a description of the work plan, to include a description of inventory processes used by the firm.
 - 3. Provide a tentative timeline expected to conduct the inventory.

Fee Structure

Provide an all-inclusive maximum cost, which is based on total fees, supplies/equipment required, and any other related expenses. Please include this information separately for each Fiscal Year FY 2024 through FY 2029 on the Financial Response Form and attach any supporting documentation.

General Terms & Conditions

- A. **Applicable Law & Courts:** This solicitation and any resulting contract shall be governed in all respects by the laws of the State of Florida. The vendor shall comply with applicable federal, state, and local laws and regulations.
- B. **Ethics in Public Contracting:** By submitting their proposals, all vendors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other vendor, supplier, manufacturer or subcontractor in connection with their proposals, and that they have not conferred on any JCSB employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
- C. **Debarment Status:** By submitting their proposals, all vendors certify that they are not currently debarred from submitting bids or proposals on contracts by any agency of the State of Florida and the federal government, nor are they an agent of any person or entity that is currently debarred from submitting bids on contracts by any agency of the State of Florida or the federal government.
- D. **Insurance:** The successful bidder shall supply JCSB with proof of insurance for automobile, workers compensation, and general liability. The awarded contractor shall furnish JCSB a current Certificate of Insurance. Provisions mandating JCSB to purchase insurance, increase policy limits, or name the vendor or other third party as an additional insured party shall not be included in contracts with JCSB. Jefferson County School Board must be shown as Additional Insured with respect to liability. Attach a copy of the policy "Additional Insured" endorsement or state on the certificate that the policy has been specifically endorsed to provide coverage, including Defense Cost Coverage for JCSB as an Additional Insured. Professional Liability is excluded.
1. COMMERCIAL GENERAL LIABILITY
 - Bodily Injury - \$1,000,000 Each Occurrence
 - Property Damage - \$1,000,000 Each Occurrence
 2. COMPREHENSIVE AUTOMOBILE LIABILITY
 - Bodily Injury - \$1,000,000 Each Occurrence
 - Property Damage - \$1,000,000 Each Occurrence
 3. WORKERS' COMPENSATION
 - To follow Florida Statutes Statutory Coverage
- E. **Mandatory Use of Terms and Conditions:** Return of the complete RFP document is required. Modification of or additions to the General Terms and Conditions of the solicitation may be cause for rejection of the proposal; however, JCSB reserves the right to decide on a case by case basis, in its sole discretion, whether or not to reject such a proposal.



OFFEROR AFFIRMATION FORM

(This form must be completed and returned with Section I of your response)

Full Company Legal Name: _____

RFP Name: Fixed Assets Inventory

RFP Number: 2024-101

After careful examination of the solicitation document in its entirety, and any addendum(s) issued, the undersigned proposes to satisfy all requirements in accordance with said documents.

For consideration of this proposal, the undersigned hereby affirms that:

1. He/she is a duly authorized official of the offeror,
2. No changes were made to the original RFP document,
3. The proposal is being submitted on behalf of the offeror in accordance with any terms and conditions set forth in this document,
4. The offeror will accept any awards made to it as a result of the proposal submitted herein for a minimum of one hundred and twenty (120) calendar days following the date of submission,
5. The offeror accepts that all of the terms and conditions of this RFP will be included in a written contract to be entered between the parties memorializing all of the terms of their agreement.

If notified in writing by mail or delivery of the acceptance of the award, the undersigned agrees to furnish and deliver the assigned Procurement officer within five (5) days of the request, a certificate of insurance indicating the coverages specified within this solicitation.

A contract shall be established which will set forth the terms of this agreement. The contract shall be interpreted, construed and given effect in all respects according to the laws of the State of Florida.

Nondiscrimination in Employment: We, the supplier of the services covered by this bid or contract, have not discriminated in the employment, in any way, against any person or persons, or refused to continue the employment of any person or persons on account of their race, color, sex, religion, national origin, marital status, sexual orientation, age, or disability.

Respectfully submitted,

Company Name: _____

Street Address: _____

City, State, Zip Code: _____

Authorized Official Name: _____

Authorized Official Signature: _____

Phone: _____ Email: _____



OFFEROR INFORMATION FORM

(This form must be completed and returned with Section I of your response)

RFP Name: Fixed Assets Inventory

RFP Number: 2024-101

Full Company Legal Name: _____

Street Address: _____

City, State, Zip Code: _____

Contact Name for Solicitation: _____ Title: _____

Phone: _____ Email: _____

Contact Name for Purchase Orders: _____ Title: _____

Phone: _____ Email: _____

Purchase orders may be delivered via email or fax. Please indicate your preferred delivery method and provide an email address or fax number.

Email: _____ Fax: _____

Company Website: _____ State of Incorporation: _____

E-Verify Number: _____ Taxpayer ID Number: _____

Does the company utilize an Affirmative Action Plan for Equal Employment Opportunity? Yes No

Has the company implemented a compliance program in accordance with the Americans with Disabilities Act? Yes No

Have any conditions or restrictions been placed on this proposal by the company that would cause it to be declared non-responsive? Yes No

Is the company currently debarred from doing business with any federal, state or local agency? If yes, please provide details and submit on a separate sheet. Yes No

Has the company ever defaulted on a contract or been denied a contract due to non-ability to perform? If yes, please provide details on a separate sheet. Yes No

Please attach a copy of your W-9 to this form.



FINANCIAL RESPONSE FORM

(This form must be completed and returned with Section II of your response)

RFP Name: Fixed Assets Inventory

RFP Number: 2024-101

Full Company Legal Name: _____

Street Address: _____

City, State, Zip Code: _____

Contact Name for Financial Response: _____

Phone: _____ Email: _____

Fixed Asset Inventory Services for Fiscal Year Ending	Total Fees	Equipment	Supplies	Other Expenses (if applicable)	All-Inclusive Maximum Cost
June 30, 2024					
June 30, 2025 renewal					
June 30, 2026 renewal					
June 30, 2027 renewal					
June 30, 2028 renewal					
June 30, 2029 renewal					

Please attach all documentation related to your Fee Structure and include three (3) copies in a sealed envelope labeled "Section II".

Signature of Authorized Agent: _____ Date: _____



NON-SUBMITTAL RESPONSE FORM

RFP Name: Fixed Assets Inventory

RFP Number: 2024-101

NOTE TO VENDOR:

If your company's response is "non-submittal", Jefferson County School Board is very interested in the reason for such response. JCSB desires to ensure that the procurement process is fair, non-restrictive and attracts maximum participation from interested companies. We therefore appreciate your responses to this non-submittal form.

Please complete and e-mail this form to: tbellflower@jeffersonschools.net

Please indicate your reason(s) for responding with a "non-submittal":

- Unable to meet the requirements for this solicitation.
- Unable to provide the services specified in this solicitation.
- Unable to meet the time frame established for start and/or completion of the project.
- Received it too late to submit a bid. Received on: _____

Other (please explain): _____

Your response will be reviewed and placed in the solicitation file. Your input will assist JCSB in determining changes necessary to increase participation in the solicitation process.

Company Name: _____

Street Address: _____

City, State, Zip Code: _____

Phone: _____ Email: _____

Primary Contact: _____ Title: _____

Authorized Official Signature: _____ Date: _____



SOLICITATION CHECKLIST

(This form must be completed and returned with Section I of your response)

RFP Name: Fixed Assets Inventory

RFP Number: 2024-101

The following items must be completed and submitted with your response. Please only include pages on which your company has included a response.

- 1. RFP reviewed in its entirety
- 2. The original and three (3) hard copies of Section I in sealed envelope
- 3. Section II of the proposal in separate sealed envelope
- 4. Offeror affirmation form completed and signed
- 5. Offeror information form completed and signed
- 6. Offeror financial response form completed and signed
- 7. Completed and signed W-9 (if not a JCSB registered vendor)