



Kathleen Mandeville  
 School Business Administrator

**Bayshore Jointure Commission**  
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June 2, 2015

**School Audit Services  
 Request for Proposals (RFP) - Evaluation & Recommendation**

**Background:**

The engagement of professional services in the area of School Audit Services was deemed necessary by the Board of Directors (Board). On April 22, 2015, the Board passed a resolution authorizing the use of Competitive Contracting for the purpose of procuring these professional services.

**Procurement Method:** Pursuant to Title 18A:18A-5a(1), professional services are not required to be bid or advertised and the Board is not required to award on the basis of lowest price and will award based on criteria as outlined in the request for proposals. Therefore, this was not a bid, but rather a Request for Proposal (RFP) that was issued. As such, the Board shall award a contract to the respondent (or respondents) whose proposal was determined to be the most advantageous to the Board (based upon the Proposal Package), price and other factors considered, to ensure the Board receives the highest quality service at a fair and competitive price.

**Request For Proposals (RFP):** The School Audit Services RFP was Legal Noticed and posted on the [www.theshorecenter.org](http://www.theshorecenter.org) website on May 6, 2015 for prospective firms to receive and review the specifications. Up until May 12, 2015, firms had the opportunity to ask questions or request an interpretation of the specifications. Questions and interpretations were addressed in the form of written Addenda 1 that was Legal Noticed and posted on the [www.theshorecenter.org](http://www.theshorecenter.org) website on May 14, 2015.

**Proposal Opening:** Two (2) proposals were submitted and opened on May 27, 2015:

Fees	<u>Smolin Lupin</u>	<u>Holman Frenia &amp; Allison, PC</u>
Audit, Lump Sum Fee	\$12,000	\$9,500
Hourly- Special Projects/Additional work	\$140	-

**Proposal Evaluation Criteria:** In accordance with the methodology of 18A:18A-4.4b and contained within the specifications of the RFP, the Proposal Evaluation Criteria included three (3) categories as detailed below which were weighted based upon importance to the District:

1. **Technical Criteria: Thirty Percent (30%):** included Executive Summary; Letter of Proposal; Letter of Intent; list of all services to be rendered; how the services will be provided; evidence of similar size/scope services to other schools; list of all immediate relatives to the commission or 'none'; evidence of any innovation or successful approach; and proposed contract agreement for review.



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2. **Management Criteria: Thirty Percent (30%): Business Organization** including: branch office locations, distance, phone, fax, email; professional history of the firm; vision and/or philosophy of the firm; projected workload and statement of ability to perform services; organization chart and the principals, partners, and support staff assigned; resumes of key staff members; detailed transition plan; and **Qualifications and Experience** including: evidence of similar size/scope services to other schools (to whom, for how long including dates, min 3-years of experience, Ed. Svcs experience a '+'); availability of personnel, facilities, equipment and resources; letters of recommendation; copies of licenses/certifications; insurance evidence; statement of any judgements, claims, suits, bankruptcies, etc.; and other information concerning the individuals that would add to evaluation.
3. **Cost Criteria: Forty Percent (40%):** included costs of services to be performed and how does the fee schedule compare to other similarly scored proposals.

**Evaluation of Proposals:** On June 2, 2015 an Evaluation Committee reviewed each of the submitted Proposal Packages from the firms as above. The Evaluation Committee was comprised of a panel of three (3) District staff members that included the Superintendent, the Business Administrator and the Assistant Business Administrator. Each Proposal Package was reviewed and scored to determine if the proposals met the Evaluation Criteria using the following whole-number scale: 0=Specifications Not Met; 1= Specifications Minimally Met; 2= Specifications Partially Met; 3= Specifications Mostly Met; 4= Specifications Fully Met; 5= Specifications Exceeded. The maximum Total Score possible = 5. Each of the responding firms met our specification requirements and each was determined to be responsive and responsible to the RFP. The results, in order of overall performance, were as follows:

1. **Holman Frenia & Allison, PC (HFA)** was the top scorer [Total Score = 3.84]. HFA scored second-place in the Technical [1.20], a close first-place in the Managerial [1.04] and scored best in the Cost [1.60] sections.
2. **Smolin Lupin (SM)** was the second-place scorer [Total Score = 3.46]. SM scored best in the Technical [1.23], a close second-place in the Managerial [1.02], and scored second-place in the Cost [1.20] sections.

**Recommendation:** The review of the RFP submissions show that Holman, Frenia & Allison has scored to provide the greatest benefit to the Commission, price and other factors considered. Based upon each respondent's submission documents and careful examination of same, it is thus determined that Holman, Frenia & Allison is a stronger respondent than Smolin Lupin to provide the professional services as described for the 2015-2016 fiscal year.



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*I hereby certify that I have reviewed the conflict of interest standards in the Local Government Ethics Law or the School Ethics Act, as appropriate, and that I do not have a conflict of interest with respect to the evaluation of this proposal. I further certify that I am not engaged in any negotiations or arrangements for prospective employment or association with any of those submitting proposals or their parent or subsidiary organization.*

*Kathleen Mandeville*

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Business Administrator- Board Secretary