



Capital Asset Management Services
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REQUEST FOR PROPOSALS
For
Performance (Proposition 39) Audit Services

RFP issued: October 8, 2009

RFP due: October 29, 2009, 4:00 p.m.

Place: Sacramento City Unified School District
Contracts Office
5735 47th Avenue
Sacramento, CA 95824

Contact: James C. Dobson, Director II
Capital Asset Management Services and Strategic Planning
Deadline for questions is October 20, 2009, 1:00 p.m.
All questions must be submitted in writing to:
Requests-Information@sac-city.k12.ca.us.
Subject line: RFP for Performance
(Proposition 39) Audit Services

To obtain a copy of the RFP, go to www.scusd.edu. Go to Newsroom, Public Notices, Requests for Proposals and Qualifications.
A copy may also be obtained by calling 916-643-2464.

Submittal Instructions: Complete proposals must be delivered to the above address prior to the date and time specified. Late submittals will not be accepted. In addition to your complete firm name and address, please annotate the shipping envelope packet as follows:
CONFIDENTIAL: Request for Proposals for Performance (Proposition 39) Audit Services.

I. INTRODUCTION and BACKGROUND

Sacramento City Unified School District is an urban district operating 50 elementary schools, five K-8 schools, nine middle schools, nine high schools, and dependent charter, adult education, and alternative education campuses. The district's current enrollment averages 42,000 in all grades. The district's annual budget exceeds \$500,000,000.

On November 5, 2002, voters approved Measure "1" (67.2% approval), authorizing the Sacramento City Unified School District to issue and sell \$225 million in general obligation bonds for the purpose of upgrading and constructing school facilities. This bond initiative was passed under Proposition 39.

The district is seeking the professional services of a consultant to provide all the necessary and related services for the preparation of an annual Performance (Proposition 39) audit of the district's Proposition 39 bond program.

II. GENERAL INSTRUCTIONS and SUBMITTAL REQUIREMENTS

- Submit one original proposal, unbound, and four (4) copies, in a sealed envelope or other sealed packaging, bearing the complete name and return address of the firm.
- In addition to your complete firm name and address, please annotate the envelope(s) as follows: CONFIDENTIAL: Request for Proposals for Performance (Proposition 39) Audit Services. Improper identification may result in premature opening of, or failure to consider the material. All requirements must be addressed in your proposal. Non-responsive proposals will not be considered. All proposals, whether selected or rejected, shall become the property of the district and may be subject to the California Public Records Act. The district reserves the right to reject any or all proposals or any part of a proposal.
- The total number of pages is limited to 15. The proposal shall be concise and to the point; however, it must be sufficiently detailed to allow for a thorough evaluation and comparative analysis.
- Each proposal must be signed by an authorized representative.
- Any additions or corrections to the RFP will be addressed in the form of addenda and posted to the website. It is the responsibility of prospective bidders to check the website for updates or addenda.

III. DUE DATE, TIME, PLACE:

Deadline for submission: Thursday, October 29, 2009, 4:00 p.m.

Proposals must be delivered on or before the due date and time specified to the attention of the Contracts Office at the address specified below. Late proposals will not be accepted.

Office hours for receipt of proposals are Monday through Friday from 8:00 a.m. to 5:00 p.m., local time, excluding holidays.

Mailing and Delivery Address for Proposals

Sacramento City Unified School District
Contracts Office
5735 47th Avenue
Sacramento, CA 95824

Contact Personnel

For copies of Requests for Proposals:
JoAnn Sulli 916-643-2464
joanns@sac-city.k12.ca.us

IV. SCOPE OF SERVICES

The provided scope of services will encompass a wide array of tasks and shall be comprehensive in nature, including all necessary research, documentation, exhibit preparation, legislative analyses, and meeting attendance.

The CONSULTANT shall:

1. Audit Measure "I" bond expenditures and financial records from July 1, 2005, through June 30, 2009, in accordance with the requirements of Proposition 39 using the Government Auditing Standards (GAS) published by the Comptroller General of the United States;
2. Investigate whether all project scopes funded by the bond measure are included in the ballot proposition;
3. Review and audit the extent of project performance in relation to the expenditure of the bond proceeds using the specifications of the Measure "I" ballot language. (See Exhibit "A");
4. Prepare and provide the District and its Governing Board a status report of the results of the audits; and,
5. Attend meetings of the Governing Board and the Citizens' Bond Oversight Committee, if requested by the District.

V. PROPOSAL CONTENT

In submitting your firm's response to this Request for Proposals, please include the following information:

A. *Project Understanding/Executive Summary*

- ♦ Present a brief and non-technical narrative describing CONSULTANT'S understanding of the requirements and proposed approach.

B. *Firm's Qualifications/Experience*

- ♦ Describe your firm's experience with respect to Proposition 39 performance audits.
- ♦ Indicate the number of Proposition 39 performance audits performed by your firm.
- ♦ Include criteria your firm has used to evaluate bond performance for other clients.

C. *Personnel*

- ♦ Identify the CONSULTANT in charge of the project. Designate the individual(s) who will be working on day-to-day activities with District staff. Provide a brief description of their experience.

D. *Scope of Services*

- ♦ Outline, in detail, the tasks your firm will perform to produce information and services requested under the "Scope of Services" section. As necessary, indicate any additional or "optional" tasks.
- ♦ Provide an itemized list of client responsibilities; e.g., information the Sacramento City Unified School District will need to provide to CONSULTANT to initiate and complete the audit process.

E. Client References (Minimum of 3)

- ◆ Provide the name, title, agency name, and phone number of the contact person(s) for which your firm has provided Proposition 39 performance audit services.

F. Fee Proposal

- ◆ Provide the total cost (lump sum) for the required scope of services.
- ◆ Provide an hourly rate schedule for any additional services the District may request that are not involved in the normal audit process outlined in the scope of services.

G. Sub-consultants

- ◆ List any SUBCONSULTANT(s) anticipated on this project, along with their specific tasks and references.

H. Community Commitment

- ◆ Describe your firm's policy related to community involvement and commitment.
- ◆ Describe any employee community involvement projects that your firm supports.
- ◆ Describe how your firm encourages, recognizes, and supports volunteerism or other community minded projects.

VI. RESPONSE FORMAT

Responses are required for Part V, Proposal Content, sections A through H. Responses to each section must be identified by the applicable section title.

VII. EVALUATION CRITERIA

The committee evaluating the proposal will base the selection on criteria that includes, but is not limited to, the following un-prioritized attributes:

- ◆ Adherence to the specified format;
- ◆ Completeness of the proposal;
- ◆ Acceptable and verifiable references;
- ◆ Level of service and support;
- ◆ Experience, professional, and technical expertise of staff;
- ◆ Proposer's demonstration of project knowledge; and
- ◆ Fee proposal.

VIII. SELECTION CRITERIA

The District will evaluate the responses to the RFP, and recommend award of contract to the Board of Education.

Following the evaluation of submittals, interviews may be held for some or all firms to supplement the written material. If scheduled, we will contact you regarding a specific interview time. For scheduling purposes, **please include a contact person and phone number in your written response.**

IX. OTHER PERTINENT INFORMATION

- A. ORAL INTERVIEW** — After the initial review of written proposals, discussions with prospective firms may or may not be required. If scheduled, the oral interview will be a question/answer format for the purpose of clarifying the intent of any portions of the proposal. The individual from your firm that will be directly responsible for carrying out the contract, if awarded, should be present at the oral interview.
- B. CONDITIONS FOR PROPOSAL ACCEPTANCE** — This Request for Proposals does not commit the District to award a contract or to pay any costs incurred for any services. The District, at its sole discretion, reserves the right to accept or reject any or all proposals received in consequence of this request; to negotiate with any qualified source; or to cancel, in part or in its entirety, this Request for Proposals. All proposals will become the property of the Sacramento City Unified School District. **Any proprietary information contained in the proposal should be clearly identified.**