

SHELBY COUNTY BOARD OF EDUCATION

PROCUREMENT SERVICES

160 South Hollywood Street, Room 126 □ Memphis, Tennessee 38112-4892 □ Phone (901) 416-5376
(This proposal will not be accepted electronically or by facsimile. All proposals must be mailed or delivered to the above address.)

REQUEST FOR QUALIFICATIONS (NOT AN ORDER)

Please submit response for the request listed below. The right is reserved to reject any or all responses. If substitutions are offered, give full particulars. The Qualifications must be submitted no later than January 16, 2024 @ 1:00 PM, CST

The Shelby County Board of Education reserves the right to accept or reject any or all proposals, or any part thereof, and to waive any minor informalities and/or technicalities that are deemed to be in the best interest of the Shelby County Board of Education. Successful Respondents shall be paid only when delivery is complete. For the appropriate purchases, all material data safety data sheets (MSDA) must accompany all shipments covered under Tennessee Hazardous Chemical Right to Know Law- Tennessee Public Chapter #417- House Bill #731.

REQUEST FOR QUALIFICATIONS

PT, OT, SLP, AUD, and Interpreting for the Deaf Services

The Shelby County Board of Education ("SCBE") is soliciting statements of qualifications from service providers for Professional Architectural and Engineering Services for Shelby County Board of Education.

Responses MUST be received by Memphis-Shelby County Schools ("MSCS" or "District") by the due date and time set forth above.

Questions or requests for clarification of technical issues and terms pertaining to this RFQ must be submitted in writing via e-mail to jonesta@scsk12.org and received by SCBE no later than 10:00 AM CST on January 4, 2024.

ISSUED BY: Toni Jones

RFQ# 011624TJ

Responses are submitted with a declaration that no Shelby County Board of Education Member or employee has a financial or beneficial interest in this transaction

NAME OF FIRM

PHONE

FAX#

ADDRESS

CITY

STATE

ZIP CODE

E-MAIL ADDRESS

AUTHORIZES REPRESENTATIVE NAME

CHECK HERE IF YOUR COMPANY QUALIFIES AS A LOCAL VENDOR

PLEASE NOTE: Per the Memphis-Shelby County Schools Local Preference Purchasing Board Policy 2011, local preference purchasing means giving preference to businesses located within Shelby County, Tennessee where local vendors must have a physical address located within the limits of Shelby County for at least six (6) months prior to the bid or proposal opening date. A Post Office Box is not acceptable.

"Shelby County Board of Education does not discriminate in its Programs or employment on the basis of race, color, religion, national origin, handicap/disability, sex or age."

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PART I: SCOPE OF WORK

1.0 INTRODUCTION

SCBE is soliciting “Request for Qualifications for **PT, OT, SLP, AUD, and Interpreting for the Deaf Services**. Specifications are contained in the RFQ. Responses submitted must meet or exceed all requirements. Statements of qualifications that do not meet submission requirements may be considered non-responsive.

2.0 BACKGROUND

Shelby County Board of Education (SCBE) is the legal name of the Memphis-Shelby County Schools (MSCS) district. MSCS is Tennessee’s largest public school district and is among the 25 largest public-school districts in the United States. MSCS serves approximately 110,000 students in 207 schools. We employ more than 6,200 teachers and 6,000 support personnel to serve our unique student population while offering programming and services to fit the needs of all our students.

Memphis-Shelby County Schools has created a data-driven culture that serves as the backdrop for strategic decision-making and informed solution-based decisions. The information gleaned from data, research-based strategies, and performance outcomes provides our district with amazing opportunities to offer high-quality educational options to every student.

The MSCS mission is to prepare all students for success in learning, leadership, and life through three strategic initiatives. The initiatives are:

1. Strengthen Early Literacy (K-2) and Continuing Literacy (3-12)
2. Recruit, Retain, Immerse, and Entrench
3. Relevant, Rigorous, and Equitable Academics

3.0 SCOPE OF SERVICES

The purpose of this Request for Qualifications (“RFQ”) is to solicit statements of qualifications from service providers for **PT, OT, SLP, AUD, and Interpreting for the Deaf Services** for Memphis-Shelby County Schools. **Please see Part V. Scope of Services for detailed scope of services on p. 14.**

4.0 NON-EXCLUSIVE

This contract is for the convenience of SCBE and is considered to be a "Non-Exclusive" use contract. SCBE does not guarantee any usage. SCBE will not be held to purchase any particular brand, in any groups, prices or discount ranges, and services, but reserves the right to purchase any item(s) and/or services listed in the response submitted.

5.0 NOTICE OF INTENT TO AWARD

A Notice of Intent to Award is written notification letter that a vendor has been selected for a contract award. Notice of Intent to Award is sent to the vendor, but this letter is not a guarantee of award. The Board of Education reserves the right to reject or accept the recommendation submitted. If the Board accepts and approves the recommendation, a

contractual arrangement will be established with the successful Vendor. If the Board rejects the recommendation, the Notice of Intent to Award will be effectively rescinded.

PART II: GENERAL TERMS AND CONDITIONS

1.0 STATEMENT OF CONFIDENTIALITY

It is understood and agreed that all information pertinent to this solicitation may contain trade secrets, which are confidential and proprietary. The selected Firm/Consultant agrees not to disclose or knowingly use any confidential or proprietary information of SCBE and/or third-party participant.

Response submissions are subject to the Tennessee Open Records Act ([Tenn. Code Ann. §10-7-503 et seq.](#)). In accordance with the Act, certain information is subject to public disclosure. Please be advised that should you deem any portion of your proposal as confidential or proprietary, it must be conspicuously indicated on those portions so deemed. However, and in accordance with the Act, you are hereby notified that every portion may still be subject to disclosure under the Act.

2.0 TERM OF AGREEMENT

The anticipated term of this contract shall be for one (1) year.

Upon satisfactory service and by mutual agreement SCBE reserves the right to renew the contract. The term of renewal shall not exceed two (2) additional one (1) year periods.

3.0 PRE-STATEMENT OF QUALIFICATIONS MEETING - N/A

4.0 QUESTIONS AND INQUIRIES

No interpretation of the meaning of the specifications or other documents will be made to any Vendor orally. Questions shall be submitted in writing to the Point of Contact (see Part II, § 5.0). To be given consideration, the questions must be received **NO LATER THAN January 4, 2024 @ 10:00 A.M., CST**. Questions that are deemed to be substantive in nature will be posted on SCBE website www.scsk12.org/procurement/bids. Please do not submit questions in PDF format.

Note: January 2-4, 2024, Questions: Must be submitted by the dates indicated. Any questions submitted before or after the date indicated in this RFQ will not be accepted. January 2-4, 2024 @ 10a.m., CST

RFQ Schedule	
RFQ Post	December 20, 2023
Questions Due	January 4, 2024, by 10:00a.m., CST
Q&A Post on MSCS Website	January 8, 2024, by EOD
Response to RFQ Due	January 16, 2024 @ 1:00pm CST

5.0 POINT OF CONTACT

Toni Jones, Academic Sourcing Manager
Procurement Services
E-mail: jonesta@scsk12.org

6.0 SUBMISSION DEADLINE

In order to be eligible for consideration, statement of qualifications must be received in Procurement Services no later than **1:00 p.m. CST, January 16, 2024, at 160 S. Hollywood St., Room 126, Memphis TN, 38112**. Vendors mailing proposals shall allow sufficient carrier delivery time to ensure timely receipt of their proposal to Procurement Services. Responses received after the submission deadline, no matter what the reason, will be returned unopened. Delivery to SCBE's mailroom, lobby, etc. shall not constitute delivery to the **Procurement Services Office, which is located at 160 S. Hollywood Street, Room 126, Memphis, TN 38112**.

7.0 CONTRACT FACILITATOR/SCBE SUPERVISION

The Firm/Consultant's performance will be under the technical direction of the Shelby County Board of Education and Office of the General Counsel who will be responsible for ensuring Firm/Consultant's compliance with the requirements of this contract to include managing the daily activities of the contract, providing technical guidance to the contract, and overall project scheduling and coordination. The Firm/Consultant shall be accountable to the end users on all matters relating to the scope of work.

8.0 CONTRACT TYPE

The contract resulting from this solicitation will be a time and material contract.

9.0 PAYMENT TERMS

The Firm/Consultant shall submit an invoice detailing the services provided. Payment shall be in accordance with contract price on the Purchase Order and made within 30 days after the date on the invoice.

SCBE reserves the right to reduce or withhold contract payment in the event the Firm/Consultant does not provide the Department with all required deliverables within the timeframe specified in the contract or in the event that the Firm/Consultant otherwise materially breaches the terms and conditions of the contract.

10.0 RFQ REVISIONS

Should it become necessary to revise any part of this RFQ, addenda will be posted on SCBE's Procurement Services website @ <http://www.scsk12.org/procurement/bids>. All addenda, amendments or changes issued shall be deemed received by Firm/Consultant provided they are posted to SCBE Procurement Services website. Failure of any Firm/Consultant to receive or acknowledge receipt of such addenda or interpretation shall not relieve any Firm/Consultant from any obligations under this RFQ as amended by all addenda. All addenda so issued shall become part of the award.

11.0 RFQ RESPONSE OPENING

RFQ responses are not opened publicly, but in the presence of at least two Procurement Services' employees. Once the submitted responses are opened, the Procurement Services employee will prepare a document that summarizes the responses received.

12.0 DURATION OF OFFER

A response to this solicitation is binding upon the Firm/Consultant and is considered irrevocable for a minimum of **120 days** following the closing date for receipt of initial submittal response or the closing date for receipt of a best and final offer, if applicable.

13.0 INSURANCE – All Firm/Consultants must complete and sign the attached Certificate of Insurance Coverage from with their response, per the attached insurance requirement form (See Appendix G).

14.0 LIQUIDATED DAMAGES

In the event the Award Bidder(s) fails to deliver the goods or services of the contract in accordance with the specifications, SCBE reserves the right to purchase the goods/services on the open market in sufficient quantities to assure the continued operation of SCBE. All additional expenses incurred by SCBE as a result of such purchases will be deducted from the moneys owed or moneys which may become due.

15.0 CRIMINAL BACKGROUND CHECK/PHOTO IDENTIFICATION BADGE

In accordance with TN Code Ann. 49-5-413, unless explicitly excluded by statute; and pursuant to Memphis-Shelby County Schools' requirements, Vendors (persons, corporations or other entities) whose employee(s), subcontractor(s), or representative(s) will come in contact or close proximity to MSCS students during the course of business, must require their employee(s), subcontractor(s), or representative(s) to supply a fingerprint sample, submit to a criminal history records check to be conducted by the Memphis-Shelby County Schools, Tennessee Bureau of Investigation, and the Federal Bureau of Investigation, and obtain Memphis-Shelby County School's identification badge prior to permitting the person to have contact with the children or entering school grounds.

The cost of fingerprinting, conducting the criminal records check, and obtaining a Memphis-Shelby County School's identification badge will be the sole responsibility of the Vendor for each of the Vendor's employee(s), subcontractor(s), or representative(s). The Memphis-Shelby County School's identification badge shall be worn at all times by each of the Vendor's employee(s), subcontractor(s), or representative(s) at shirt pocket height while on Memphis-Shelby County Schools' property. For more information regarding fingerprinting, conducting the criminal records check, and obtaining a Memphis-Shelby County School's identification badge, please contact 901-416-4720.

MSCS further reserves the right to audit the criminal history background records of any Vendor employee(s), subcontractor(s) or representative(s) having contact with MSCS students. Audits may be conducted on a quarterly basis with 48 hours' prior notice. It is the Vendors responsibility to ensure records are current and made available upon request to MSCS. Failure to provide MSCS access to current criminal history checks upon request could lead to Vendor debarment.

16.0 COMPLIANCE WITH LAWS

Firm/Consultants shall comply with all federal, state, and local laws, statutes, ordinances, rules, and regulations applicable to the services to be rendered under its Contract with MSCS, if awarded. Firm/Consultants violation of any of these laws, statutes, ordinances, rules or regulations could constitute a breach of its Contract and entitle SCBE to terminate the Contract immediately, consistent with terms of the agreement.

17.0 LEGAL COMPLIANCE

- A. Firm/Consultant shall comply in all respect with federal, state, and local regulations, including laws regarding eligibility to work in the United States. Any disputes, legal cases or other controversies shall be pursued in Tennessee Courts consistent with and subject to Tennessee state law. Additionally, if applicable, all materials, supplies, equipment, or services supplied, as a result of a contract shall comply with the applicable U.S. and Tennessee Occupational Safety and Health Act Standards.
- B. Specifically, Firm/Consultant shall comply with all applicable laws and regulations relating to the employment of aliens, and such failure, shall constitute a material breach of contract. It is a mandatory requirement of this contract that employees of Firm/Consultant and Firm/Consultant's sub-Consultants are screened through the Federal Government's E-Verify system, found at www.dhs.gov/E-Verify . This is a "no fee" service.

18.0 EPA COMPLIANCE

Materials, supplies, equipment, or services shall comply in all respects with the Federal Noise Control Act of 1972, where applicable.

19.0 BONDING – (N/A)

20.0 TERMS AND CONDITIONS

Any contract entered into in connection with this solicitation shall incorporate these General Terms and Conditions except as otherwise modified herein.

It shall be the Firm/Consultant's sole responsibility to insure they are compliant with all applicable federal and state laws, rules, ordinances, statutes, etc., that may impact this contract. SCBE shall bear no responsibility for monitoring the Firm/Consultant's compliance with said legal requirements. If the Firm/Consultant fails to maintain legal compliance, SCBE may find said Firm/Consultant in default.

In the event of conflict between the General Terms and Conditions and any part or portion of the Special Conditions (Appendix A), these General Conditions shall take precedence.

21.0 MINORITY AND WOMEN-OWNED BUSINESS ENTERPRISES (2 CFR 200.321)

The Shelby County Board of Education (hereafter referred to as the "Board") recognizes that minority, women, and small business owners frequently face unique problems that are not encountered by majority-owned businesses. Therefore, it is the policy of the Board to take necessary affirmative steps, in accordance with 2 CFR 200.321, to assure that equal opportunities are provided for MWBEs to participate in the performance of District contracts financed in whole or in part with federal funds.

2 CFR § 200.321 - Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

Title 2: Grants and Agreements

PART 200—UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS

200.321 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

(a) The Non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

(b) Affirmative steps must include:

(1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

(2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

(3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

(4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;

(5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and

(6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

Certified MWSBE Vendor Directory

To access Shelby County Schools list of certified MWBE vendors, please use the link below.

<http://www.scsk12.org/mwbe/index>

Go to the "Certified Vendor Directory" tab and follow the instructions to download the entire list of certified MWSBE firms.

PART III: STATEMENT OF QUALIFICATIONS FORMAT

1.0 GENERAL FORMAT – SUBMISSION

A. Vendors shall submit the following, so labeled:

Statement of Qualifications must include **One (1) original (labeled), seven (7) copies, and 1 (one) USB** in a sealed envelope clearly labeled. **An electronic version of the response must also be submitted with the original.** Electronic media must be a USB and shall bear a label on the outside containing the RFQ number and name as well as the name of the Vendor.

B. The envelope and the outside of each package shall, in addition, be labeled with the following:

1. The Vendor's name and business address.
2. The due date/time for receipt of state of qualifications/proposal.
3. The title of the RFQ number.

2.0 STATEMENT OF QUALIFICATIONS FORMAT

The statement of qualifications must include a table of contents and all pages in the response must be numbered, consecutively from beginning to end and separated by tabs as described below:

TAB A. TRANSMITTAL LETTER

Technical proposals are to be accompanied by a brief transmittal letter prepared on the Vendor's letterhead and signed by an individual who is authorized to commit the Vendor to the services and requirements in the RFQ and vendor response. This transmittal letter shall include:

1. The name, title, address, telephone number, and electronic mail address of the person authorized to bind the Vendor to the contract, who will receive all official notices concerning this RFQ.
2. The Vendor's Federal Tax Identification Number or Social Security Number.
3. A brief statement of the Vendor's understanding of the work to be done, the commitment to perform the work within the time period, and a statement of why the firm believes it is best qualified to perform the engagement.
4. A statement that the statement of qualifications is a firm and irrevocable offer for a period of one-hundred twenty (120) days.
5. Acknowledgement of all Addenda to this RFQ.

TAB B. TABLE OF CONTENTS

TAB C. EXPERIENCE AND CAPABILITIES

Vendor shall provide information on past and current experience with rendering services similar in size and scope to those in this RFQ. This description shall include:

1. Introduction/Cover Letter: Include organization name, address, telephone, and email address. Direct contact information of the lead representative.
2. Summary of the services offered including the number of years the vendor provided these services; the number of clients and geographic locations the vendor currently serves, etc. and has served; and if a past customer, why the vendor is no longer providing services.
3. Qualifications: List of Services provided by vendor's organization and portfolio of work that illustrates vendor ability to support the education sector.
4. Organizational chart of the vendor showing the major components of the unit(s) that will be performing the requirements of this contract, where the management of this contract will fall within the organization; and what resources will be available to support this contract in primary, secondary and back-up roles.
5. Name all key personnel who will perform work under this contract and include each individual's resume. Include work history, educational background and indicate the proposed role/function of each individual.
6. At least three (3) professional and recent references from its customers who are capable of documenting the following: a) stating how vendor company has met a district's need, b) organizations/institutions familiar with vendor company and quality of work (education sector preferred), c) the vendor's ability to manage similar contracts, d) the quality and breadth of services provided by the vendor under similar contracts (See Appendix C). If Memphis Shelby County Schools is a client or has been a client of the Respondent for the services outlined in the RFQ, **MSCS reserves the right to be a reference, if not listed.**

TAB D. FISCAL INTEGRITY/FINANCIAL STATEMENTS

1. The Vendor shall include in its response completed audited financial statements including the auditor's notes, for its last three years. If the Vendor has not had its financial statements audited by an independent accounting firm, the Vendor must submit such un-audited financial statements as it has. Some acceptable methods include but are not limited to one or more of the following:
 - a. Recently audited (or best available) financial statements
 - b. Dunn and Bradstreet Rating
 - c. Standard and Poor's Rating
 - d. Lines of credit
 - e. Evidence of a successful financial track record
 - f. Evidence of adequate working capital
2. Vendor shall identify any claims during the past five (5) years and provide information on any pending litigation, lawsuits etc. The failure to provide accurate information may be determined to be a material breach of any future agreement or contract with SCBE.

TAB E. TECHNICAL RESPONSE TO RFQ SCOPE OF SERVICES

The Vendor shall address each major requirement of the RFQ (separated by tabs if substantial).

TAB F. FORMS

1. Bid Bond (If Applicable)
2. Special Terms & Conditions for RFQ'S (Appendix A)
3. Addenda Acknowledgement Form (Appendix B)
4. References (Appendix C)
5. Completed Non-Collusion Certificate (Notarized) (Appendix D)
6. Completed Debarment Affidavit (Notarized) (Appendix E)
7. Completed Anti-Bribery Affidavit (Notarized) (Appendix F)
8. Certificate of Insurance Coverage (Appendix G)
9. Local Preference Program (Appendix H)
10. Complete Non-Boycott of Israel Certification (Appendix I)
11. Complete Iran Divestment Act Certification (Appendix J)
12. Complete Certification Regarding Lobbying (Appendix K)

Failure to provide any of the requested information or documents in this solicitation may render the proposal non-responsive.

PART IV: EVALUATION AND SELECTION PROCEDURE

1.0 EVALUATION COMMITTEE

- A. A. The committee will evaluate each proposal using the evaluation criteria set forth below. As part of this evaluation, the Committee may hold discussions with all qualified Firms. Discussions may be conducted via in-person, teleconference, or may take the form of questions to be answered by the Vendors and conducted by mail, Email, or facsimile transmission at the discretion of SCBE. During the evaluation process, the committee may request technical assistance from any source.
- B. The Evaluation Committee may reject in whole or in part any and all proposals, waive minor irregularities, and conduct discussions with all responsible. Vendors in any manner deemed necessary to serve the best interests of SCBE.
- C. If applicable, SCBE Policy 2011 Local Preference Purchasing will be applied accordingly. Please see Appendix H for policy details.
- D. Vendors may be asked to make an oral presentation to the Evaluation Committee. The purpose of the oral presentation is to provide an opportunity for the Vendor to clarify its proposal submission and substantiate proposal representation. If an oral presentation is requested, the oral presentation is a part of the evaluation.
- E. The Committee will recommend the vendor whose overall proposal provides the most advantageous offer to SCBE considering all RFQ requirements, based on evaluation factors set forth in this RFQ.

2.0 EVALUATION CRITERIA

The evaluation committee will evaluate the responses using the following criteria, but not limited to, as indicated below. The committee shall determine which response has the basic requirements of the RFQ and shall have the authority to determine whether any deviation from the requirements of the RFQ is substantial in nature. The committee may reject in whole or in part any and all proposals and waive minor irregularities.

- A. Approach to satisfying requirements
- B. Firm/Consultant's experience and capabilities/references
- C. Fiscal Integrity/Financial Stability

Evaluation Criteria	Major
	Weights
Qualifications/Experience	25%
General Qualification Requirements	60%
References	10%
Financial Stability	5%
Total	100%

PART V: SCOPE OF SERVICES (DETAILS)

Request For Qualification RFQ# 011624 TJ PT, OT, SLP, AUD, and Interpreting for the Deaf Services

1.0 The Services.

1.1 The Services. MSCS hereby solicits submissions of qualifications, on a competitive basis, from qualified Respondents to provide MSCS with the services described herein, all in accordance with the terms and conditions detailed herein. In particular, the services sought by MSCS will require the Respondent to provide:

Memphis-Shelby County Schools (MSCS) is seeking qualified PT, OT ST, Audiology, and Educational Interpreters for the deaf and hard of hearing. These services are required under IDEA (34 CFR 300) to meet obligations in the Individual Education Plan (IEP).

Definition of Occupational and Physical Therapy:

- Tennessee Code Annotated 63-13-103 Occupational and Physical Therapy Practice Act (2019) refers to "Occupational therapy practice" as the therapeutic use of everyday life activities (occupations) for the purpose of enabling individuals or groups to participate in roles and situations in home, school, workplace, community, and other settings. Occupational therapy addresses the physical, cognitive, psychosocial, and sensory aspects of performance in a variety of contexts to support engagement in occupations that affect health, well-being, and quality of life. Personnel are required to hold current Tennessee Health Related Board licensure as an Occupational Therapist or Occupational Therapy Assistant.
- Tennessee Code Annotated 63-13-103 Occupational and Physical Therapy Practice Act (2019) refers to the "practice of physical therapy" as: (A) Examining, evaluating and testing individuals with mechanical, physiological and developmental impairments, functional limitations and disability or other health and movement-related conditions in order to determine a physical therapy treatment diagnosis, prognosis, a plan of therapeutic intervention and to assess the ongoing effect of intervention; (B) Alleviating impairments and functional limitations by designing, implementing, and modifying therapeutic interventions that include, but are not limited to, therapeutic exercise, functional training, manual therapy, therapeutic massage, assistive and adaptive orthotic, prosthetic, protective and supportive equipment, airway clearance techniques, debridement and wound care, physical agents or modalities, mechanical and electrotherapeutic modalities and patient-related instruction; (C) Reducing the risk of injury, impairments, functional limitation and disability, including the promotion and maintenance of fitness, health and quality of life in all age populations; and (D) Engaging in administration, consultation, education and research. Personnel are required to hold current Tennessee Health Related Board licensure as a Physical Therapist.

Definition of Speech / Language Therapy and Audiology:

- Tennessee Code Annotated **63-17-103 Licensure Act for Communication Disorders and Sciences Part 1 Speech Language Pathologists and Audiologists** 2019) refers to the “Practice of speech language pathology” as: the nonmedical application of principles, methods and procedures for measurement, testing, assessment, prediction, counseling or instruction related to the development and disorders of speech, voice, language or oral pharyngeal or laryngeal sensorimotor competencies for the purpose of assessing, preventing, treating, ameliorating or modifying such disorders and conditions in individuals and groups of individuals. TCA 63-17-103 refers to “Practice of audiology” as the nonmedical application of principles, methods and procedures for the assessment of the auditory and vestibular systems, including the interpretation of behavioral and physiologic measures, and the design and implementation of programs of hearing conservation and preservation and programs of habilitation and rehabilitation for auditory and vestibular disorders including the assessment, selection, fitting and sale of amplification systems or other assistive devices and technologies;

Qualifications for Speech Language Pathologists (SLP):

- Speech Language Pathologists (SLP) are required to hold a Certificate of Clinical Confidence (CCC) from the American Speech – Language - Hearing Association (ASHA) and hold or be eligible for a Tennessee Health Related Board and Tennessee Department of Education licensure as a SLP. Therapist may also be in the Clinical Fellowship Year (CFY) with ASHA.
- Speech Language Pathology Assistant (SLP/A) must hold or be eligible for a Tennessee Department of Education license.
- Speech-Language Teletherapy Assistant must hold a high school diploma.
- Audiologists are required to hold a current Tennessee Health Related Board license as an audiologist.

Qualifications for Educational Interpreters:

- Rules of the State Board of Education Chapter 0520-02-06
Employment Standards 0520-02-06-.04 Employment Standards for additional support personnel.
- Educational Interpreters. All individuals employed by LEAs or charter schools to provide educational interpreting for students who are deaf, deaf-blind, or hard of hearing must hold a valid Tennessee School Services Personnel license with the appropriate endorsement or must meet the following employment standards:
 - (a) All non-licensed educational interpreters employed by an LEA or charter school prior to January 1, 2021, shall satisfy the following requirements by January 1, 2021:
 1. Obtain a passing score on the written portion of the Educational Interpreter Performance Assessment (EIPA); and
 2. Obtain a minimum score of 3.0 on the performance assessment portion of the EIPA.
 - (b) All non-licensed educational interpreters employed by an LEA or charter school on January 1, 2021, or after, shall satisfy the following requirements:
 1. Hold at a minimum an associate’s degree.
 2. Obtain a passing score on the written portion of the EIPA; and
 3. Obtain a minimum score of 3.0 on the performance assessment portion of the EIPA.

General Qualification Requirements for Speech Language Pathology Assistant (SLP/A):

- The following requirements are set forth as guidelines for Speech-Language Pathology assistant for the Memphis Shelby County Schools. The respondent **must** agree to provide any or all of the following services as a speech language pathology assistant.
 - SLP/A must hold or be eligible for a Tennessee Department of Education license.
 - Provide professionally appropriate services
 - Abide by FERPA and HIPAA confidentiality.
 - Promote safe student access and participation with peers.
 - To assist the SLP with clerical duties and with implementation of IEP, selecting, preparing, and presenting therapy materials effectively
 - To maintain student progress documentation
 - To use a variety of screening tools and protocols, as well as managing screenings and documentation
 - To provide effective direct implementation of therapy objectives to students individually and in small groups
 - To interact collaboratively with parents, students, supervisor, and school staff
 - To develop schedules for student services that meet IEP services
 - To modify and differentiate lessons to meet student needs and progress with guidance from the supervising SLP
 - To develop and provide appropriate lessons/materials to ensure progress toward student IEP goals
 - To develop low-tech AAC materials, as well as program augmentative and alternative communication (AAC) devices and provide training and assistance regarding the devices to students, staff, and families
 - To consult with supervising SLP regarding student progress or when there are questions regarding alteration of student plan to increase progress
 - Personnel must contact the principal of the assigned school(s) and the therapist supervisor if sick or absent from work.
 - Personnel must be available for orientation and training.
 - Personnel must be flexible for assignment changes.
 - Personnel will be able to serve multiple schools.

General Qualification Service Requirements for Speech Language Teletherapy Assistant:

- The following service requirements are set forth as guidelines for speech language teletherapy assistant for the Memphis Shelby County Schools. The respondent **must** agree to provide any or all of the following services as a speech language teletherapy assistant.
 - To ensure that the student is attending the session on time, assisting with the process of logging in and getting started
 - To check placement of cameras and ensure that devices being utilized for therapy are charged and functioning properly
 - To be competent with technology and assist with any unforeseen technical difficulties, including but not limited to troubleshooting with video and audio equipment if needed.
 - To ensure that the space where the student will participate in sessions has proper lighting and minimal visual or auditory distractions
 - To ensure students have the necessary materials during their therapy sessions (i.e. manipulatives, token boards, visual schedules, dry erase board, paper, etc.)

- To assist with behavior management and provide prompts/scaffolding to reengage a distracted student
- To use the light/camera for the student and SLP to see the inside of the mouth for specific articulation activities, and help model correct placement of sounds
- To coordinate with the SLP to communicate openly about student participation in activities
- Speech language teletherapy assistant must hold a high school diploma
- Abide by FERPA and HIPAA confidentiality.
- Promote safe student access and participation with peers.
- Personnel must contact the principal of the assigned school(s), the assigned therapist, and the therapist's supervisor / manager if sick or absent from work.
- Personnel must be available for orientation and training.
- Personnel must be flexible for assignment changes.
- Personnel willing to serve multiple schools.

Additional Qualification Requirements

The respondent shall agree to provide for therapists and audiologists office technology required to complete job responsibilities, including, but not limited to a laptop, printer, etc.

- The Contracting Agency agrees to inform MSCS (Memphis Shelby County Schools) of changes in staffing at the time of the change.
- The Therapist agrees to accept assignments to schools made by the respective supervisory personnel.
- Contract staff will perform services under the supervision of the Special Education Director/ Special Education Manager / Advisor or Lead Therapists.
- The Contracting Agency agrees that MSCS has the right at any time to request removal of any contracted health care provider whom MSCS deems to be unsatisfactory for any reason. Upon such request, the contractor shall use all reasonable efforts to promptly replace the contract staff.
- The Contracting Agency agrees to notify MSCS of any claim or suit made or filed against the Contracting Agency resulting from or related to any employee's performance of the services requested in the RFQ.
- The Contracting Agency agrees to provide the district additional support for continuing education trainings on topics applicable to school based services to meet Tennessee Health Board licensure requirements.
- Memphis Shelby County Schools will make available to the contract therapist adequate evaluation, treatment materials, and in-service training.
- The Therapist will abide by all rules and regulations of MSCS as are applicable to his / her duties and responsibilities. The Therapist will obey and implement all rules and regulations concerning confidentiality in the same manner and to the same degree as required of the employees of MSCS.
- The contract staff shall provide all federal and state licensing requirements.
- The Therapist must be capable of providing proof of auto liability insurance for any vehicle used in the implementation of this contract.
- The contracting agency identifies the person in RFQ at said agency who will sign the contract as the vendor (Signatory representative with email, phone, fax, and physical address)
- The vendor designates a person or persons dedicated to MSCS recruitment and shares this contact information with MSCS Lead Therapists, Advisors, Managers, and Directors.

- Vendor should demonstrate ability / history of providing licensed health care providers that have completed a full assignment (full school year at one school district)
 - Vendors who demonstrate retention of licensed professionals who return for 3 school years should note this.
 - Vendor has the structure to orient and support new professionals to school-based practice following the Tennessee Department of Education's (TDOE) Speech-Language Pathology Services Guidelines and the TDOE OT PT Guidance for Educational Services.
 - Vendor should demonstrate knowledge of best practices for school-based delivery models of services as espoused by ASHA, AOTA, APTA and the TDOE service guides. Vendor provides minimum of two reference letters that provide examples of how the vendor met the agency's needs (addressing a minimum of two bullets in the RFQ requirements.)
- **Invoices should be sent to:** Memphis Shelby County Schools Exceptional Children and Health Services, 4774 Sea Isle Road, Memphis, TN 38117
ATTN: Executive Director Deborah Harris, Rebecca Fik, Doris Wheat, Kyna Woollery, Laurie Bainer, Angela Brown, & Annie Kelly

Respondent shall include in response (but not limited to): (See Tab C, Experience and Capabilities 1-6 on page 10 of this RFQ).

1. Introduction/Cover Letter

- Include organization name, address, telephone, and email address.
- Direct contact information of lead representative.

2. Qualifications

- List of services provided by your organization.
- Portfolio of work that illustrates your ability to support the education sector.

3. References

- Provide reference(s) stating how your company has met a district's need.
- Three (3) professional references from organizations/institutions familiar with your company and quality of work (education sector preferred).

If Memphis Shelby County Schools is a client or has been a client of the Respondent for the services outlined in the RFQ, **MSCS reserves the right to be a reference, if not listed.**

PART VI: APPENDICES

APPENDIX A - SPECIAL TERMS AND CONDITIONS FOR RFQ

1. These Terms and Conditions shall apply unless otherwise noted in General Terms and Conditions attached to individual bid request. It shall be the Firm/Consultant's sole responsibility to insure they are compliant with all applicable federal, state, and city laws, rules, ordinances, statutes, etc., that may impact this contract. SCBE shall bear no responsibility for monitoring the Firm/Consultant's compliance with said legal requirements. If the Firm/Consultant fails to maintain legal compliance, SCBE may find said Firm/Consultant in default.

2. REQUEST FOR QUALIFICATIONS (RFQ)

- a. DIRECTIONS: SCBE invites all interested and qualified Firm/Consultants to submit a response to this RFQ in accordance with directions specified in the attached General Terms and Conditions and these Special Terms and Conditions.
- b. DEFINITIONS: For the purpose and clarity of this document only, "SCBE" will mean The Memphis-Shelby County Schools. Also, for the purpose and clarity of this document, "Firm/Consultant" will mean any reliable and interested broker, Firm/Consultant, supplier, Firm/Consultant, and/or manufacturer that want to respond to this RFQ.

2. GENERAL REQUIREMENTS

- a. AUTHORIZED DEALERS: Only authorized dealers may submit a proposal on requested equipment. At the discretion of SCBE, a certificate, executed by the manufacturer, may be requested stating that the Firm/Consultant is an authorized agent of the manufacturer and is duly authorized to service and maintain the equipment.
- b. INSPECTIONS: SCBE reserves the right to have inspectors on the premises of the manufacturer during the process of manufacture of any products being furnished under this RFQ for as long as may be considered necessary by SCBE. All expenses of the inspectors shall be borne by SCBE. The presence of the inspectors at the site of manufacture of the products shall not relieve the Awarded Firm/Consultant of responsibility for faulty workmanship of materials that may be discovered at any time after delivery and prior to final acceptance in accordance with the specifications. In case of factory inspection of items being manufactured for SCBE, every facility shall be afforded inspectors by the manufacturers for the pursuance of their work.
- c. TYPES OF PURCHASES: These specifications are intended to cover the various types of purchases of equipment, materials, supplies, or services as shown to any or to each of the various public and charter schools, offices, or to any designated warehouse or warehouses in Shelby County.
- d. SINGLE PRICE: Unless otherwise specified in the General Terms and Conditions attached to this RFQ, the Firm/Consultant will not be allowed to offer more than one price on each item even though the Firm/Consultant may feel that it has two or more types or styles that will meet specifications. Firm/Consultant must determine which to offer. If said Firm/Consultant should submit more than one price on any item, all prices for that item will be rejected.
- e. AGGREGATE BIDS: Where provision is made on the proposal form for bidding items on an individual, group or aggregate basis, the award will be made on whichever basis is in the best interest of SCBE. When an aggregate bid is requested, the unit prices for each item shall be identified in the response. The unit prices in an aggregate bid should be consistent with the total quoted price for an aggregate bid. No bid or a combination of items will be permitted except as noted in the General Terms and Conditions.

- f. **MINIMUM REQUIREMENTS:** Whenever mention is made of any article, material, service be in accordance with laws, or similar expressions, the requirements of these laws, ordinances, etc., shall be construed as to the minimum requirements of these specifications. In case of any apparent conflict between the specifications and such laws, ordinances, etc., the Awarded Firm/Consultant shall call said conflict to the attention of SCBE Director of Procurement Services for a decision before proceeding with any work.
- g. **USE OF BRAND NAMES:** Brand names and model numbers are offered as a reference for Firm/Consultants as to the style, size, weight, and other characteristics of the item(s) in the specifications. The use of such brand names should not be interpreted to be the exclusive brand desired unless so stated. The determination of the acceptability and/or the criteria for acceptability of an alternate is solely the responsibility of SCBE.
- h. **PRODUCT OFFERED BY THE FIRM/CONSULTANT:** The product or services offered by the Firm/Consultant shall be new, not used, and the latest version of the product. Should a product be discontinued and/or upgraded during the course of the contract, the Firm/Consultant shall offer to SCBE a new alternate product that meets and/or exceeds the established specifications, under the same terms, conditions, and prices as the originally offered item.
- i. **COMPLIANCE WITH SPECIFICATIONS:** The Firm/Consultant shall abide by and comply with the true intent of the specifications and not take advantage of any unintentional error or omission but shall fully complete every part as the true intent and meaning of the drawings and specifications, as decided by the Procurement Director. Where the requirements of the specifications call for higher grade and are not in conflict with the laws, ordinances, etc., the specifications shall govern. Where the requirements of the laws, ordinances, etc., are mandatory, they shall govern. The successful Firm/Consultant, after award and before manufacture and/or shipment, may be required to submit working drawings or detailed descriptive data identified as acceptable to SCBE, which would provide sufficient data to enable SCBE to judge the Firm/Consultant's compliance with the specifications.
- j. **DEVIATIONS TO SPECIFICATIONS:** Any deviation from the specifications must be noted in detail by the Firm/Consultant, in writing, as an attachment to the response. The absence of a written list of specification deviations attached to the response will hold the Firm/Consultant strictly accountable to SCBE to the specification as written. Any deviation by the Awarded Firm/Consultant from the specifications, without prior documented approval, will be grounds for rejection of the goods and/or equipment when delivered.
- k. **Piggyback Clause:** Shelby County Board of Education reserves the right to extend the terms, conditions, and prices of this contract to other Institutions (such as State, Local and/or Public Agencies) who express an interest in participating in any contract that results from this RFQ. Each of the piggyback institutions will issue their own purchasing documents for purchasing of the goods. Proposer agrees that the Shelby County Board of Education shall bear no responsibility or liability for any agreements between Proposer and the other Institution(s) who desire to exercise this option.

Each participating jurisdiction or agency shall enter into its own contract with the Awarded Bidder(s) and this contract shall be binding only upon the principals signing such an agreement. Invoices shall be submitted in duplicate "directly" to the ordering jurisdiction for each unit purchased. Disputes over the execution of any contract shall be the responsibility of the participating jurisdiction or agency that entered into that contract. Disputes must be resolved solely between the participating agency and the Awarded Bidder. SCBE does not assume any responsibility other than to obtain pricing for the specifications provided.

3. CONFLICT OF INTEREST

- i. In accordance with policy 1013 Superintendent Code of Ethics SCBE has promulgated Ethics Policies, which cover conflict of interest, financial disclosure, and lobbying. All bidders are expected to comply with any and all SCBE Ethics Policies that may apply to them individually or as a business entity.
- ii. All bidders should carefully review the conflict-of-interest policies. Specific attention should be accorded to SCBE Ethics Policies (SCBE Policy 4002) prohibiting SCBE employees from benefiting from business with the school system.
- iii. All bidders are placed on notice that all questions/interpretations concerning SCBE Ethics Policies may be submitted to the Ethics Review Panel in accordance with SCBE Policy 4002.

4. PRICES (If requested)

- a. UNIT PRICES: Unit Prices must be rounded up to no more than two (2) decimal places, unless so specified in the General Terms and Conditions included with the RFQ. All unit prices on items shall be completed on the proposal sheet(s). A NO BID notation must be completed for each item not being bid. In case of error in extension of prices in the proposal response, the unit price shall govern.
- b. UNITS OF MEASURE: Wherever SCBE indicates the unit of measure required and the Firm/Consultant's price is based on a different unit of measure, it shall be at the sole discretion of SCBE to determine whether the Firm/Consultant's price will be recalculated. SCBE will not accept any proposals with Firm/Consultant escalator clauses, unbalanced figures, or irregular features.
- c. DELIVERY CHARGES: All prices shall include FOB Destination.
- d. CASH DISCOUNTS: Cash discounts will not be taken into consideration in determining a contract award. All discounts, other than prompt payment, are to be included in the bid price.
- e. PRICE REDUCTIONS: SCBE reserves the right to accept price reductions from the Awarded Firm/Consultant during the term of this contract to occur no less than thirty (30) days from the approval of the contract.
- f. TAXES: Tax Exemption. SCBE is a tax-exempt entity and, as such, is exempt from the payment of taxes, including but not limited to sales and use taxes, federal excise taxes and federal high use taxes.

5. ITEM DELIVERY

- a. GENERAL DELIVERY REQUIREMENTS: All materials, supplies, and equipment for SCBE shall be delivered F.O.B. Destination. All deliveries must be inside the building. Delivery hours shall be Monday through Friday with the exception of holidays, to offices - between **8:30 a.m. and 3:30 p.m.**; to schools - between **9:00 a.m. and 2:30 p.m.** The Awarded Firm/Consultant(s) shall be held responsible for clean-up and removal of all packing cartons, boxes, crates, packing materials, etc., from the premises after delivery and set up of any furniture and equipment. Drivers must be bonded, have a clean driving record and have the appropriate training to handle hazardous items. Firm/Consultant will have the ability (including all applicable permits and licenses) to handle all types of shipments ranging from letters to

multi-carton shipments, including bulky and fragile items. Delivery must include a current MSDS for each hazardous chemical or chemical compound delivered or used by the Firm/Consultant at a SCBE worksite. The Awarded Firm/Consultant shall be liable for the full replacement value of any delivery item lost or damaged.

- b. **SPECIAL DELIVERY INSTRUCTIONS:** Special Instructions for delivery dates, delivery of heavy equipment, materials or machinery requiring special handling, to schools/sites under construction and/or renovation or refrigerated goods will be defined in General Terms and Conditions.
- c. **PACKING:** All materials must be securely packed in accordance with accepted trade practices. SCBE Purchase Order number must be plainly visible on the exterior of each container. A packing slip and/or delivery ticket shall be included in each shipment. This ticket shall contain the following information: Purchase Order Number, Firm/Consultant Name, Name of the Article, Item Number, Quantity, and Delivery Location (Example: ABC Elementary School Library) and Bid/Contract Number. Failure to comply with this condition may be considered sufficient reason to refuse to accept the goods.
- d. **SAFETY REQUIREMENTS:** The Awarded Firm/Consultant shall provide all equipment and machinery furnished and delivered to SCBE complying with the Safety regulations as required by OSHA and the Tennessee State Safety Health Act known as MOSHA. The Firm/Consultant shall sign the safety section, if attached in the proposal response, certifying that the regulations for the type of equipment furnished shall meet all regulations applying to this type equipment meeting the CFR-1910 MOSHA Standard. The Firm/Consultant shall submit Material Safety Data Sheets (MSDS) for all items awarded to that Firm/Consultant provided under the terms of this proposal in accordance with OSHA Communication Standard 29 CFR 1910.101, 29 CFR 1910.1200 and 29 CFR 1926.58 or any other applicable state, federal, or local regulation. Prior to delivery of the items awarded, the Firm/Consultant must submit MSDS sheets to: SCBE Facilities Safety Officer, 1364 Farmville, Memphis, TN, 38122.
- e. **LIQUIDATED DAMAGES:** In the event the Awarded Bidder fails to deliver the goods or services of the contract in accordance with the specifications, SCBE reserves the right to purchase the goods/services on the open market in sufficient quantities to assure the continued operation of SCBE. All additional expenses incurred by SCBE as a result of such purchases will be deducted from the monies owed or monies that may become due the Firm/Consultant.

6. GUARANTEE AND WARRANTIES

- a. **GENERAL REQUIREMENTS:** Payment shall be based upon acceptance of goods or services by SCBE. Firm/Consultant expressly warrants that: (a). The merchandise to be furnished and services performed will be free from defects in material and workmanship and will be in full conformity with the specifications, drawings, representation, or sample; that this warranty shall survive acceptance and payment of the merchandise; and that the Firm/Consultant will bear the cost of inspection of all goods and services rejected. (b). The Firm/Consultant hereby provides a warranty of authorization as to all goods and services. (c). The goods or services furnished must be or have been mined, manufactured, or produced in full compliance with at least the minimum conditions required under the Fair Labor Standards Act of 1938, as amended, and all other applicable local state and federal laws, rules, and regulations to include Department of Transportation (DOT), Food and Drug Administration (FDA) regulations, and the Equal Opportunity Clause contained in Executive Order 11246, as amended. If applicable to the goods or services purchased herein, Firm/Consultant must also be in full compliance with the Workplace Hazardous Materials Information System (WHMIS) legislation and maintain a written Hazard Communication Plan.

- b. Awarded Firm/Consultant, its employees, agents, volunteers, and Firm/Consultants who may have contact with students must be in compliance with Title 5, Subtitle 5, Part VI, of the Family Law Article of the Tennessee Code. All costs thereof shall be borne by the Firm/Consultant.
- c. GUARANTEE PERIOD: The Firm/Consultant shall unconditionally guarantee all services, materials, and workmanship of all furniture, goods, and equipment furnished by it for a period of one year from the date of acceptance, i.e., delivery and installation, unless a longer period of warranty is specified in the General Terms and Conditions attached to the RFQ.
- d. OFFICE EQUIPMENT: Firm/Consultant agrees to provide on-site service of equipment within eight (8) hours of notification by school system personnel. Loaner equipment shall be supplied; free of charge, during the warranty period if the office equipment cannot be repaired within three (3) working days.
- e. OTHER EQUIPMENT: Certain pieces of equipment, machinery, and refrigeration will require guarantees other than detailed above. Refer to General Terms and Conditions for requirements on specific equipment.
- f. MANUFACTURER'S AGENT: The Firm/Consultant shall act as the manufacturer's agent for all warranty claims.

7. BONDING

- a. BID BONDS: (N/A)

8. PROPOSAL SUBMISSION

- a. KNOWLEDGE OF TERMS AND CONDITIONS: Firm/Consultants or their authorized representatives are expected to fully inform themselves as to the conditions, requirements, and specifications before submitting a proposal response. Failure to do so will be at the Firm/Consultant's own risk and Firm/Consultant cannot secure relief on the plea of error. Neither law nor regulations make allowance for errors of omission or commission on the part of Firm/Consultants.
- b. PARTNERSHIPS: Proposals by partnerships must be signed with the partnership name by one of the members of the partnership or by an authorized representative, followed by the signature and designation of the person signing, who shall also state the names of the individuals composing the partnership.
- c. CORPORATIONS: Proposals by corporations must be signed with the name of the corporation, followed by the signature and designation of the officer having authority to sign. When requested, satisfactory evidence of authority of the officer signing in behalf of the corporation shall be furnished. Anyone signing the proposal as agent shall file satisfactory evidence of authorization to do so.
- d. CERTIFICATES AND AFFIDAVITS: All Firm/Consultants shall be required to complete the certificates and/or affidavits that are incorporated into the General Terms and conditions of this RFQ. Such documents are required by local, state, or federal funding agencies of SCBE as part of the bidding process. The documents may include: Anti-Bribery Affidavit, Debarment Certificate, Sales Tax Certification, Minority Business Enterprise affidavit, and when applicable, Asbestos Free Certification.
- e. SAMPLES: When indicated in the General Terms and Conditions, a properly tagged sample and descriptive data shall be submitted to the address specified no later than the date specified in the Schedule of Events included in the General Terms and Conditions. The tag on the sample shall indicate the item number, the name of the company submitting the sample, and

the RFQ number. SCBE will not be responsible for any samples not picked up within 30 days of the notification of Firm/Consultants to do so. Samples may be retained by SCBE until Firm/Consultants are notified to remove them. Firm/Consultants agree that SCBE will incur no liability for samples that are damaged, destroyed, lost, or consumed in testing processes. Failure to submit the above information when requested is sufficient grounds for rejection of the proposal.

- f. PROPOSAL PREPARATION FEES: SCBE will not be responsible for any costs incurred by a Firm/Consultant in preparing and submitting a proposal response.
- g. RECOMMENDATION OF AWARD: Recommendation of an award of a contract will be made in accordance with the General Terms and Conditions.

9. RESOLUTION FOR PROTEST AND DISPUTES

The Procurement Director shall attempt to resolve informally all protests of award recommendations. Vendors are encouraged to present their concerns promptly to the buyer for consideration and resolution. Open dialogue is helpful for all parties and disputes are often only a misunderstanding of the evaluation and recommendation process.

A. RIGHT TO PROTEST

Prior to the commencement of an action in court concerning the controversy, any actual vendor who claims to be aggrieved in connection with a solicitation, the solicitation process, or a pending award of a contract may protest to the Buyer. Procurement Director shall attempt to resolve informally all protest of award recommendations. Protest shall be submitted in writing within seven (7) days after such claimant knows or should know of the facts giving rise to the protest

1. An aggrieved bidder of standing or Vendor may protest to the Buyer a proposed award of a contract for supplies, equipment, services, or maintenance. A bidder of standing is a bidder who would be directly next in line for an award should the protest be supported.
 - a. The protest shall be in writing addressed to the Buyer with a copy to the Procurement Director and shall include the following:
 - The name address and telephone number(s) of the protester.
 - Identification of the solicitation
 - Statement of reasons for the protest
 - Supporting documentation to substantiate the claim
 - The remedy sought
2. The protest must be filed with the Procurement Office within seven (7) calendar days of the recommendation of award or notification to the bidder or Vendor that their bid or proposal will be rejected.
3. A vendor who does not file a timely protest before the contract is executed by the Board is deemed to have waived any objection.
4. The Procurement Director shall inform the Chief Financial Officer (CFO) upon receipt of the protest.
5. The Procurement Director shall confer with the general counsel prior to issuance of a decision regarding disputes of contracts or awards.

B. BOND REQUIREMENTS

1. Neither a protest nor a stay of award shall proceed under this section unless the protesting party posts a protest bond. For an RFQ, the protesting party shall post with the Procurement Director, at the time of filing a notice of protest, a bond payable to the Shelby County Board of Education in the amount of five percent (5%) of the estimated maximum liability provided in the procurement document. The protest bond shall be in form and substance acceptable to the Shelby County Board of Education and shall be immediately payable to the Shelby County Board of Education conditioned upon a decision by the protest committee that:
 - a. A request for consideration, protest, pleading, motion, or other document is signed, before or after appeal to the Chief Financial Officer, in violation of subsection (b);
 - b. The protest has been brought or pursued in bad faith; or
 - c. The protest does not state on its face a valid basis for protest.
2. The bond shall be payable to the Shelby County Board of Education for any other reason approved by the Procurement Office. The Board of Education shall hold the protest bond for at least eleven (11) calendar days after the date of the final determination by the Procurement Director. If the protesting party appeals the Procurement Director's determination to the protest committee, the Procurement Director shall hold the protest bond until instructed by the General Counsel Office to either keep the bond or return it to the protesting party.
3. At the time of filing notice of a protest of a procurement in which the lowest bid or lowest evaluated cost proposal is less than one million dollars (\$1,000,000), a minority-owned business, woman-owned business, service-disabled veteran-owned business, or small business protesting party may submit a written petition for exemption from the protest bond requirement of subsection (c). The petition shall include clear evidence of a minority-owned business, woman-owned business, service-disabled veteran-owned business, or small business status. On the day of receipt, the petition shall be given to the chief procurement officer. The chief procurement officer has seven (7) calendar days in which to make a determination. If an exemption from the protest bond requirement is granted, the protest shall proceed as though the bond were posted. Should the chief procurement officer deny an exemption from the requirement, the protesting party shall post the protest bond with the chief procurement officer as required in subsection (c) within five (5) calendar days of the determination.

C. APPEAL OF CONTRACT AWARD DECISION

1. The Procurement Director shall issue a decision in writing. Any decision of an award protest may be appealed to the CFO within seven (7) days of issuance of the decision by the Procurement Director.
2. Any decision of an award protest may be appealed to the Superintendent within seven (7) days of issuance of the decision by the Chief Financial Officer.
3. The Superintendent will evaluate the issues involved and render a decision. The decision of the Superintendent is final.

10. CONTRACT TERM

The Firm/Consultant shall refer to the General Terms and Conditions attached to the RFQ for details regarding the Term of Contract for this solicitation.

11. COMMENCEMENT OF SERVICES

SCBE shall have no obligation to pay for services performed before SCBE approves the contract or after it ends. SCBE shall have no obligation to pay for services in excess of the monetary amount of the award. SCBE shall have no obligation to pay for services before a purchase order is issued.

12. ADDENDA

- a. **INQUIRIES:** No interpretation of the meaning of the specification or other documents will be made to any Supplier orally. To be given consideration, inquiries must be received as outlined in Part II Item 4.0. Unless otherwise specified in the General Terms and conditions, inquiries are to be emailed to the Buyer, "INQUIRY" and the RFQ name and number must be noted on the envelope. Alternatively, inquiries may be e-mailed to the Buyer. The subject field of the e-mail must include "INQUIRY" and the solicitation name and number.
- b. **ISSUANCE:** Any changes to the RFQ specifications will be made through the appropriate addenda. Failure of any Supplier to receive such addenda or interpretation shall not relieve any Supplier from any obligations under this RFQ as amended by all addenda. All addenda so issued shall become part of the award.

13. ANNULMENTS AND RESERVATIONS

- a. **RIGHT TO REJECT:** SCBE reserves the right to exercise its statutory option to reject any or all proposals and re-advertise other proposals. SCBE reserves the right to order the said equipment, materials, supplies or services as described within the specifications, and SCBE also reserves the right not to order any items(s) within the specification.
- b. **WAIVER OF TECHNICAL DEFECTS:** SCBE reserves the right to waive technical defects, if in its judgment the interest of SCBE shall so require.
- c. **CONTRACT RESERVATIONS:** SCBE reserves the right to annul any contract if, in its opinion, there shall be a failure, at any time, to perform faithfully any of its stipulations, or in case of any willful attempt to impose upon SCBE materials, products and/or workmanship inferior to that required by the Firm/Consultant, and any action taken in pursuance of this latter stipulation shall not affect or impair any rights or claims of SCBE to damages for the breach of any covenant of the contract by the Firm/Consultant(s). Should the Firm/Consultant(s) fail to comply with the conditions of this contract or fail to complete the required work within the time stipulated in the contract, except for circumstances beyond its control, including, but not limited to, Acts of God, war, flood, governmental restrictions, or the inability to obtain transportation, SCBE reserves the right to purchase the required articles in the open market or to complete the required work at the expense of the Firm/Consultant(s). Should the Firm/Consultant be prevented from furnishing any item or items, or from completing the required work included in the contract, by reason of such failures caused by circumstances beyond its control, including but not limited to Acts of God, war, flood, governmental action, or the inability to obtain transportation, SCBE reserves the right to withdraw such items or required work from the operation of this contract without incurring further liabilities.
- d. **AUTHORITY TO DEBAR OR SUSPEND** The Procurement Director shall have the authority to debar a person or company for cause from consideration for award of contracts.

14. TERMINATION OF CONTRACT

- a. TERMINATION FOR NON-APPROPRIATION OF FUNDS: SCBE may terminate a contract with a vendor, in whole or in part, due to insufficient funding or non-appropriation of funds with written notice to the Firm/Consultant. SCBE shall pay for all of the purchases or outstanding services, if any, incurred up to the date of the termination notice.
- b. TERMINATION FOR DEFAULT: When the Firm/Consultant has not performed or has unsatisfactorily performed the contract, payment shall be withheld at the discretion of SCBE. Failure on the part of a Firm/Consultant to fulfill contractual obligations shall be considered just cause for termination of the contract, and the Firm/Consultant is not entitled to any costs incurred up to the date of termination. In the event of a default by the Firm/Consultant, this Contract may be terminated.
- c. TERMINATION FOR CONVENIENCE: SCBE has the right to terminate this Agreement at any time, without any liability, upon five (5) days prior written notice to Firm/Consultant, provided that Firm/Consultant shall be compensated for services rendered prior to the date of termination.
- d. Each participating jurisdiction and/or local educational agency (LEA) public school district has the right to withdraw from the terms of the contract without showing cause, by providing thirty (30) calendar days' written notice to the Firm/Consultant(s). The participating jurisdiction/ LEA shall pay all reasonable costs incurred by the Firm/Consultant(s) up to the date of termination. The Firm/Consultant(s) shall not be reimbursed for any anticipatory profits which have not been earned up to the date of termination.

Language to support Termination for Convenience by the Firm/Consultant(s) shall be so stipulated in the contract document between jurisdiction/ LEA and the Firm/Consultant(s). Such language, when included, shall take precedence over the language of this specification.

15. GOVERNING LAW & VENUE

- a. The RFQ shall be construed in accordance with, and interpreted under, the laws of the State of Tennessee. Any lawsuits arising out of such RFQ shall be filed in the Circuit Court of Memphis, Tennessee.

16. CONTRACT TERMS AND CONDITIONS

- a. SUBMISSION OF INVOICES: Supplier agrees to accept the line item price on the purchase order as final payment. All invoices are to be submitted promptly showing Purchase Order number, and name and address of recipient and mailed to SHELBY COUNTY BOARD OF EDUCATION, Accounts Payable Office, Room 160 S. Hollywood, Room 250, Memphis, TN 38112 (unless otherwise noted). **Firm/Consultants must receive written authorization from Procurement to redirect invoice submission to another location other than Accounts Payable.**
- b. INCORRECT INVOICES: Incorrect invoices will be returned for correction or paid in accordance with the purchase order. Each invoice shall identify SCBE Purchase Order Number, line item number and item descriptions or services shall be listed in the same order as on the Proposal and/or Purchase Order.
- c. PARTIAL PAYMENTS: Payment in full will only be made upon final acceptance of items as shown on Purchase Order. Partial payments are permissible.

- d. **LATE SUBMISSION OF INVOICES:** The parties acknowledge and agree that the Firm/Consultant's invoices are to be submitted in a timely manner, per the terms of the purchase order, after the services have been provided or the goods and materials have been provided. If invoices are submitted after one calendar year after the Firm/Consultant's services have been rendered or the last date when goods and materials were accepted by SCBE, then SCBE shall have no obligation to pay for the stale invoices.
- e. **CONFIDENTIALITY:** Firm/Consultant acknowledges and agrees to hold all Confidential Information in the strictest confidence as a fiduciary and will not make any press release or public announcement, or voluntarily sell, transfer, publish, disclose, display or otherwise make available to any third persons such Confidential Information or any portion thereof without the express written consent of SCBE. Firm/Consultant and its employees, agents, volunteers and Firm/Consultants shall maintain the confidentiality of all medical, psychological, and student records in compliance with federal and state laws. Additionally, Firm/Consultant shall procure from the parent or guardian of each student receiving services hereunder a written consent in favor of Firm/Consultant and SCBE for the mutual disclosure of such records by and among the Firm/Consultant, SCBE and SCBE' employees, agents, volunteers and Firm/Consultants.
- f. **INDEMNIFICATION:** Firm/Consultant shall indemnify, defend, and hold harmless the SHELBY COUNTY BOARD OF EDUCATION, Superintendent and their respective elected/appointed officials, employees, departments, agencies, agents and volunteers from any and all claims, demands, suits, and actions, including attorney's fees, litigation expenses and court costs, connected therewith, brought against the SCBE and their respective elected/appointed officials, employees, departments, agencies, agents, and volunteers, arising as a result of direct or indirect, willful, or negligent act or omission of the Firm/Consultant or its employees, agents, or volunteers.
- g. **INSURANCE:**
1. The vendor must maintain and pay for Comprehensive Business Insurance to protect their claims under the Workers' Compensation Act, from claims or damages because of bodily injury to others, including employees of SCBE, damage to the property of others, including SCBE, claims for damages arising out of the operation of motor vehicles, which may arise during the performance of the contract whether caused by themselves or by any sub-vendor or anyone directly or indirectly employed by either of them, and Product Liability Insurance. Said insurance is to cover the duration of the contract under an express or implied warranty.

All contractors, vendors or service providers coming on to District premises to do work or provide services are required to have insurance. Insurance is necessary to cover any claims or losses for which the contractor/vendor may be responsible for. Schools or central office departments should verify a current Certificate of Insurance, including endorsements from the contractor or vendor is on file with Procurement Services prior to the beginning of work and/or the start of a contract. A Certificate of Insurance is a standard form issued by the insurance company evidencing the insurance information (including policy limits and types of insurance) of its policyholder.

2. The following coverages and limits are required of all vendors: The following minimum insurance standards shall apply to all vendors performing, selling, or distributing products and services at Memphis-Shelby County Schools. If a product or service, in the opinion of Risk Management, represents an unusual or exceptional risk, additional insurance for that product or service may be required.

- **Commercial General Liability Insurance:** Including Bodily Injury and Property Damage Liability, Independent Contractors Liability, Contractual Liability, in an

amount not less than \$1,000,000, Product Liability and Completed Operations Liability in an amount not less than \$2,000,000 combined single limit, per occurrence, and \$2,000,000 aggregate.

- **Workers' Compensation:** \$1,000,000. If the contractor/vendor has less than 5 employees, a statement on the vendor letterhead should be placed on file.
- **Employers Liability Coverage:** \$1,000,000.
- **Automobile Liability:** For vendors who will drive on District property, Automobile Liability in an amount not less than \$1,000,000 per occurrence for bodily injury and property damage, including owned, hired and non-owned vehicle coverage.
 - For Charter Bus Companies, the minimum Automobile Liability coverage required is \$5,000,000.

Other Insurance Coverage That May Be Required:

- **Professional Liability (Errors & Omissions):** Not less than \$1,000,000 per occurrence and aggregate to be maintained for the duration of the agreement and three years following its termination.
 - This insurance requirement applies when a supplier has a professional designation or license and/or is providing professional services. The minimum limit for architects and engineers is \$2,000,000 per occurrence and in the aggregate and may be increased depending upon the nature of the services to be provided to the District.
- **Umbrella or Excess Liability Coverage:** Not less than \$4,000,000 per occurrence and in the aggregate.
 - This coverage typically sits above the underlying General Liability, Automobile Liability and Professional Liability policies. Depending on the scope and work to be performed in the proposed agreement, this policy may be required in order for the vendor to be able to meet the minimum insurance requirements.
 - Required for all construction, security, IT, and healthcare related contracts.
- **Cyber Risk Insurance:** Not less than \$2,000,000 per claim to be maintained for the duration of the agreement and three years following its termination.
 - This insurance requirement applies when a third party will be using, storing or accessing private, confidential or protected information.
- **Environmental Liability:** Not less than \$2,000,000 per claim and in the aggregate.
 - This insurance requirement applies when a vendor will be performing environmental clean-up work

(decontamination/remediation), will be working with hazardous substance or waste, or may have similar such exposures while performing work under the proposed agreement. Higher limits of environmental liability coverage may be required depending upon the scope of work.

Vendors and contractors shall name the Board of Education Memphis-Shelby County Schools, it's officers, agents, employees, and volunteers as an additional insured on its general liability insurance policy.

Coverages and limits are to be considered as minimum requirements and in no way limits the liability of the vendor, contractor or service provider.

All policies shall evidence insurance written by carriers authorized to conduct business in the State of Tennessee and rated at least "A" in A.M. Best's Key Rating Guide.

Renewal certificates of insurance shall be provided annually to Procurement Services until all work is completed.

Please contact Risk Management, Sandra Burgess, burgessse@scsk12.org or 416-1997 with any questions.

3. The certificate on this insurance shall be made in favor of the **Shelby County Board of Education, Memphis TN 38112** and indicate paid up coverage for the term of the contract.
4. The certificate of insurance **TO BE SUBMITTED** to the PROCUREMENT OFFICE, 160 S. HOLLYWOOD ST., MEMPHIS, TN 38112.
5. It will be the responsibility of the successful Respondent(s) to ensure that a **current** Certificate of Insurance is on file in the Purchasing Office during the entire period of the contract.
6. The cost of the above insurance shall be considered an overhead or operating expense to the Vendor, similar to rental costs, utilities, automobile liability insurance, and other business-related expenses. **The premiums or costs to provide the above insurance shall not be directly related to the cost of the work or services specified in this Request for Proposal.**
- h. NON-ASSIGNABILITY: This contract shall not be assigned, or services subcontracted in whole or in part without the written consent of SCBE. Any attempt to do so without such written consent shall be null and void of no effect.
- i. INDEPENDENT FIRM/CONSULTANT: Firm/Consultant is furnishing its goods and/or services hereunder as an independent Firm/Consultant, and nothing herein shall create any association, partnership, or joint venture between the parties hereto or any employer-employee relationship.
- j. GENERAL RECORDS CLAUSE: Firm/Consultant's contracts, files, accounts, records, and other documents related to this Contract shall be open to examination and/or audit by SCBE and made available by the Firm/Consultant to SCBE and/or its designated agents at any time upon reasonable prior notice, during performance under this Contract and for a period of four (4) years after final payment or such longer period of time as required by law or rule or regulations.

- k. **SOLE AGREEMENT:** This Contract constitutes the sole agreement between the parties hereto and no amendment, modification, or waiver of any of the terms and conditions hereof shall be valid unless in writing and executed by both parties. Any prior verbal agreements or proposals shall not be considered a part of this Contract.
- l. **PROTECTION OF PROPERTY:** Firm/Consultant will use reasonable care to avoid damaging existing buildings, equipment, and property at SCBE sites and all material furnished by SCBE ("Property"). If the Firm/Consultant's failure to use reasonable care causes damage to any property, Firm/Consultant must replace or repair the damage at no expense to SCBE as directed by the Contracting Officer. If the Firm/Consultant fails or refuses to make such repair or replacement, the Firm/Consultant will be liable for the cost, which may be deducted from payments due Firm/Consultant.
- m. **PUBLIC STATEMENTS:** Firm/Consultant shall not use or reference the Name or Emblem of SCBE in issuing any press releases or otherwise making any public statement with respect to this Contract (unless such press release or statement is required by applicable law regulation or the requirements of any listing agreement with any applicable stock exchange) without the prior written consent of SCBE, which consent will not be unreasonably withheld. Purchase by SCBE of any articles, material, merchandise, or service does not imply that SCBE has either adopted or endorsed the product of service, and the use by any manufacturer, Firm/Consultant, merchant or other person of the name or emblem of SCBE in any advertisement that they are furnishing products or services is not authorized. The unauthorized use of the name or emblem of SCBE is prohibited by the United States Criminal Code - Section 706.

17. CHANGES IN TERMS OR DELIVERY/COMPLETION DATE

After award of individual contracts, any questions or correspondence related but not limited to the following matters must be directed to the Procurement Office Shelby County Board Of Education, Memphis, Tennessee, 38112, in writing:

In the event of strikes, Acts of God, or other circumstances beyond the Firm/Consultants control which prevent completion of service or delivery, the Firm/Consultant must secure temporary contractual relief. The circumstances and duration must be stated by the Firm/Consultant in writing and be forwarded to the PROCUREMENT OFFICE within ten (10) days after their development. Contractual relief shall be only that which is acceptable to and in agreement with the PROCUREMENT OFFICE, for those goods and services which are necessary for the day-to-day needs of SCBE. **Please Note: ALL OVERTIME MUST BE APPROVED IN ADVANCE.**

**APPENDIX B-ADDENDA ACKNOWLEDGEMENT
REQUEST FOR QUALIFICATIONS**

**RFQ 011624TJ
PT, OT, SLP, AUD, and Interpreting for the Deaf Services**

(If applicable) Please complete and return with your bid response.

I the undersigned acknowledge the receipt of the following addenda to this solicitation

Addendum #1- Date Received _____

Addendum #2 - Date Received _____

Addendum #3 - Date Received _____

Addendum #4 - Date Received _____

Signature

Title

Firm/Consultant Name

Email

Contact Phone Number

APPENDIX C – REFERENCES
REQUEST FOR QUALIFICATIONS

RFQ 011624TJ
PT, OT, SLP, AUD, and Interpreting for the Deaf Services

1.

Client Name: _____

Address: _____

Services Provided: _____

Date(s)of services: _____

Contact Name & Title: _____

Phone No: _____

Email Address: _____

2.

Client Name: _____

Address: _____

Services Provided: _____

Date(s)of services: _____

Contact Name & Title: _____

Phone No: _____

Email Address: _____

3.

Client Name: _____

Address: _____

Services Provided: _____

Date(s)of services: _____

Contact Name & Title: _____

Phone No: _____

Email Address: _____

4.

Client Name:

Address:

Services Provided:

Date(s)of services:

Contact Name & Title:

Phone No:

Email Address:

5.

Client Name:

Address:

Services Provided:

Date(s)of services:

Contact Name & Title:

Phone No:

Email Address:

APPENDIX D - NON-COLLUSION CERTIFICATE
(TO BE SUBMITTED WITH STATEMENT OF QUALIFICATIONS)

RFQ 011624TJ
PT, OT, SLP, AUD, and Interpreting for the Deaf Services

I HEREBY CERTIFY that I am the _____ and the duly authorized

representative of _____

whose address is _____ and

THAT NEITHER I nor, to the best of my knowledge, information, and belief, the above firm nor any of its other representatives I here represent:

(a) Have agreed, conspired, connived or colluded to produce a deceptive show of competition in the compilation of the RFQ or offer being submitted herewith;

(b) Have in any manner, directly or indirectly, entered into any agreement, participated in any collusion to fix the RFQ price or price proposal of the bidder or Firm/Consultant herein or any competitor, or otherwise taken any action in restraint of free competitive bidding in connection with the Contract for which the within RFQ or offer is submitted.

In making this affidavit, I represent that I have personal knowledge of the matters and facts herein stated.

(SIGNATURE)

(DATE)

(PRINTED OR TYPED NAME)

Subscribed and sworn before me this _____ day of _____, 20____.

x _____ Notary Public

My commission expires: _____

APPENDIX E - DEBARMENT AFFIDAVIT
(TO BE SUBMITTED WITH STATEMENT OF QUALIFICATIONS)

RFQ 011624TJ
PT, OT, SLP, AUD, and Interpreting for the Deaf Services

**Certification Regarding Debarment, Suspension
Ineligibility and Voluntary
Exclusion—Primary and/or Lower Tier Covered Transactions**

- (1) The prospective participant certifies to the best of its knowledge, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.
- (2) The prospective participant and its principals have not, within a three (3) year period preceding this proposal, been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.
- (3) The prospective participant and its principals are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses in Paragraph 2 of this certification.
- (4) The prospective participant and its principals have not, within a three (3) year period preceding this application/proposal, had one (1) or more public transactions (Federal, State or local) terminated for cause or default.
- (5) Where the prospective participant is unable to certify any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Signature of:

x _____
Respondent, if the respondent is an individual

x _____
Partner, if the respondent is a partnership

x _____
Officer, if the respondent is a corporation

Subscribed and sworn before me this _____ day of _____, 20____.

x _____ Notary Public

My commission expires: _____

APPENDIX F - ANTI-BRIBERY AFFIDAVIT
(TO BE SUBMITTED WITH STATEMENT OF QUALIFICATIONS)
RFQ 011624TJ
PT, OT, SLP, AUD, and Interpreting for the Deaf Services

_____, being first duly sworn deposes and says that he is an officer in the organization known as _____ and the party making a certain proposal or RFQ dated, _____ 20____, to the Shelby County of Education:

I further confirm that: Neither I, nor to the best of my knowledge, information, and belief, the above business (as in defined in Section 39-16-101 of the State of Tennessee Code of Ethics Ordinance or any of its officers, directors, partners, or any of its employees directly involved in obtaining or performing contracts with public bodies (as is defined in Section 39-16-102 Bribery of Public Servant has been convicted of bribery, attempted bribery, or conspiracy to bribe in violation of Tennessee Law, or of the law of any other state or federal law, except as follows (indicate the reasons why the affirmation cannot be given and list any conviction, plea, or imposition of probation before judgment with the date, court or administrative body, sentence or disposition, the name(s) of person(s) involved, and their current positions and responsibilities with the business):

Signature of:

x _____
Respondent, if the respondent is an individual

x _____
Partner, if the respondent is a partnership

x _____
Officer, if the respondent is a corporation

Subscribed and sworn before me this _____ day of _____, 20____.

x _____ Notary Public

My commission expires: _____

APPENDIX G - CERTIFICATE OF INSURANCE COVERAGE
 (TO BE SUBMITTED WITH STATEMENT OF QUALIFICATIONS)
RFQ 011624TJ
PT, OT, SLP, AUD, and Interpreting for the Deaf Services

FIRM/CONSULTANT NAME: _____

ADDRESS: _____

NAME OF SURETY: (TYPE OR PRINT) _____

NAME OF AGENT: (TYPE OR PRINT) _____

AGENT'S PHONE NO: _____

The below signed hereby certifies that the following information is true and correct. [Please note there may be other minimum coverage requirements based on the specifics of the project. Please see Appendix A-16 (Contract Terms and Conditions) – g (Insurance).]

TYPE OF COVERAGE	MINIMUM REQUIRED LIMITS	POLICY OR BINDER NUMBER	ACTUAL LIMITS PROVIDED	EXPIRATION DATE
COMMERCIAL GENERAL LIABILITY OCC	\$1,000,000			
COMMERCIAL GENERAL LIABILITY AGG	\$2,000,000			
BUSINESS AUTOMOBILE LIABILITY	\$1,000,000 PER OCCURRENCE			
EMPLOYERS LIABILITY	\$1,000,000			
WORKMAN'S COMP	\$1,000,000			

LIMITS ON ABOVE POLICY WILL BE INCREASED ABOVE POLICY NOW IN EFFECT

POLICY WILL BE OBTAINED/ISSUED ON _____

The following additional clauses will be considered a part of the above policy(s), the same as if specifically written therein, as pertains to the above stated contract.

- SCBE is hereby named as Additional Insured.
- The policy(s) cannot be reduced or cancelled without at least forty-five (45) days prior written notice to SCBE.

- The insurance company is prohibited from pleading government function in the absence of any specific written authority by SCBE.
- The policy(s) will be automatically included and cover all phases of work, equipment, persons, et cetera which are normally covered while performing work under the above contract, whether specifically written therein or not.
- SCBE is hereby granted authority to contact the agency directly to confirm SCBE information or obtain copies of certificates of insurance. SCBE bears no responsibility for premiums or other cost of insurance. If policy(s) is not currently in effect, it will be written immediately upon notice of award, and a copy of binder or certificate will be sent directly to SCBE. A properly executed copy of this document shall be legally binding as a Carrier Certificate of Insurance Form.

The successful bidder will be required to provide insurance coverage as shown in General Conditions of RFQ and Contract, prior to beginning any work. This insurance coverage must be maintained throughout the life of the contract. **PROOF THAT COVERAGE IS EITHER CURRENTLY IN PLACE OR WILL BE PROVIDED MUST BE SUBMITTED WITH THE BID.** This can be done by one of the two following methods:

Complete form "CERTIFICATION OF INSURANCE COVERAGE" or

Submit a Certificate of Insurance on a form provided by your Insurance Agent. This form must include the following clauses:

SCBE is hereby named as Additional Insured.

The policy(s) cannot be reduced or canceled without at least forty-five (45) days' prior written notice to SCBE.

The insurance company is prohibited from pleading government function in the absence of any specified written authority from SCBE.

The policy(s) will automatically include and cover all phases of work, equipment, persons, et cetera which are normally covered while performing work under the above contract, whether specifically written therein or not.

Regardless of the method used, the form **MUST** be totally complete, **MUST** show that all Limits of Insurance are or will be met, and **MUST** be signed by the Agent.

Failure to provide the required insurance coverage by either of the two (2) methods described above when the RFQ is submitted may result in rejection of your RFQ as being non-responsive.

(AUTHORIZED AGENT'S SIGNATURE)

(DATE)

Shelby County Board of Education

2011

Issued Date: 01/29/13

Revised: 08/31/21

LOCAL PREFERENCE PURCHASING

I. PURPOSE

To give a local preference to businesses located in Shelby County, Tennessee for the purchase of supplies, materials, equipment, and services.

II. SCOPE

This policy applies to District level contracts with a total dollar purchase greater than \$25,000.

III. DEFINITION

- A. Local Preference Purchasing means giving preference to businesses located within Shelby County, Tennessee in the purchase of personal property, materials, and contractual services and in constructing improvements to real property or to existing structures.
- B. Local Business means a vendor or contractor who holds a valid license to do business in Shelby County, Tennessee; has a street address within the limits of said locality for a continuous period of at least six (6) months prior to bid or proposal opening date; and has proof that Shelby County Personal Taxes are current (applies to local businesses who have been doing business in Shelby County, Tennessee for a year or more).

IV. POLICY STATEMENT

The Shelby County Board of Education recognizes that a significant amount of funds are spent on purchasing personal property, materials, and contractual services and in constructing improvements to real property or to existing structures. The Board also recognizes that dollars used in making purchases are derived largely from revenues generated from businesses located within Shelby County, Tennessee. The Board believes that funds generated in the community should be placed back into the local economy. Therefore, it is the policy of Shelby County Board of Education to provide a preference to local businesses in procurement transactions whenever the application of such a preference is reasonable in light of the dollar-value of proposals received in relation to such expenditures.

In the bidding of, or letting for procurement of supplies, materials, equipment and services, with a total price greater than \$25,000, if the lowest responsive bidder is a regional or nonlocal business, then all bids received from Local Businesses are decreased by five (5) percent. The original bid is not changed; the five (5) percent is calculated only for the purpose of determining the Local Preference. The Local Preference cost differential is not to exceed one hundred thousand dollars (\$100,000.00).

In the case of request for proposals, letters of interest, best evaluated bids, qualifications or other solicitations and competitive negotiation and selection in which objective factors are used to evaluate the responses, Local Businesses will be assigned five (5) percent of the total evaluation points up to a maximum of five (5) points.

In the event of a tie between a local and non-local business, favor shall be given to the Local Business and a coin toss method will be used to break ties between two (2) or more local businesses meeting said specifications.

Exceptions

This preference shall not apply to purchases or contracts that are funded in whole or in part by a governmental entity if the laws, regulations or policies governing such funding prohibit application of the Local Preference; when exigent emergency conditions or noncompetitive situations exist; and when a particular purchase, contract, or category of contracts for which MSCS is the awarding authority is waived upon written justification and recommendation of the Board.

Restrictions

The Local Preference shall apply to District level purchases only. The preference shall apply to new contracts for supplies, materials, equipment, and services first solicited after January 29, 2013.

V. RESPONSIBILITY

- A. The "users" of services are responsible for furnishing an objective evaluation of their needs and for identifying the specifications of the services to be delivered.
- B. The Chief Financial Officer is responsible for developing final specifications and obtaining all bids, requests for proposals, and contracted service agreements.
- C. The Chief Financial Officer is responsible for ensuring that all services have been properly approved and all procedures followed before signing contractual agreements.
- D. The Superintendent is responsible for ensuring compliance with this policy.

APPENDIX I
(TO BE SUBMITTED WITH BID)
RFQ# 011624TJ PT, OT, SLP, AUD, and Interpreting for the Deaf Services



STATE OF TENNESSEE
NON-BOYCOTT OF ISRAEL CERTIFICATION

The Bidder certifies that it is not currently engaged in and will not for the duration of the contract engage in, a boycott of Israel as defined by Tenn. Code Ann. § 12-4-119. This provision shall not apply to contracts with a total value of less than two hundred fifty thousand dollars (\$250,000) or to contractors with less than ten (10) employees.

According to the law, a boycott of Israel means engaging in refusals to deal, terminating business activities, or other commercial actions that are intended to limit commercial relations with Israel, or companies doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel to do business, or persons or entities doing business in Israel, when such actions are taken:

- 1) In compliance with, or adherence to, calls for a boycott of Israel, or
- 2) In a manner that discriminates on the basis of nationality, national origin, religion, or other unreasonable basis, and is not based on a valid business reason. Tenn. Code Ann. § 12-4-119.

Signature of Authorized Representative	Date
Printed Name	Phone Number / Email Address

**APPENDIX J
(TO BE SUBMITTED WITH BID)**

RFQ# Error! Reference source not found.PT, OT, SLP, AUD, and Interpreting for the Deaf Services



**STATE OF TENNESSEE
IRAN DIVESTMENT ACT CERTIFICATION**

SUBJECT CONTRACT NUMBER(S):	
CONTRACTOR LEGAL ENTITY NAME:	
EDISON SUPPLIER IDENTIFICATION NUMBER:	

The Iran Divestment Act, Tenn. Code Ann. § 12-12-101 et. seq. requires a person that attempts to contract with the state, including a contract renewal or assumption, to certify at the time the bid is submitted or the contract is entered into, renewed, or assigned, that the person or the assignee is not identified on a list created pursuant to § 12-12-106.

Currently, the list is available online at the following website:

<https://www.tn.gov/generalservices/procurement/centralhttps://www.tn.gov/generalservices/procurement/central-procurement-office--cpo-/library-/public-information-library.htmlprocurement-office--cpo-/library-/public-information-library.html>

The Contractor, identified above, certifies by signature below that it is not included on the list of persons created pursuant to Tenn. Code Ann. § 12-12-106 of the Iran Divestment Act.

CONTRACTOR SIGNATURE

NOTICE: This certification **MUST** be signed by an individual with legal capacity to contractually bind the Contractor.

PRINTED NAME AND TITLE OF SIGNATORY

DATE

APPENDIX K
(TO BE SUBMITTED WITH BID)
RFQ# 011624TJ PT, OT, SLP, AUD, and Interpreting for the Deaf Services

CERTIFICATION REGARDING LOBBYING

Applicable to Grants, Sub-grants, Cooperative Agreements, and Contracts Exceeding \$100,000 in Federal Funds.

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 certification shall be subject to a civil penalty or 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 officer or employee of any agency a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into of 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, and officer or employee of Congress, or an employee of a Member of Congress in connection with the 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 the certification be included in the award 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.

FNS Grant/Cooperative Agreement

Name/Address of Organization

Name/Title of Submitting Official

Signature Date