

Opa-locka Community Redevelopment Agency



RFP NO: 23-0615200

REQUEST FOR PROPOSAL (RFP)

BOOKKEEPING AND ACCOUNTING SERVICES

FOR

OPA-LOCKA COMMUNITY REDEVELOPMENT AGENCY



OPA-LOCKA CRA
RFP NO. 23-0615200

BOOKKEEPING AND ACCOUNTING SERVICES
FOR
OPA-LOCKA COMMUNITY REDEVELOPMENT AGENCY

TABLE OF CONTENTS

<u>Subject</u>	<u>Page Number</u>
Cover	1
Table of Contents.	2
Advertisement.....	3
Part I - Proposal Guidelines.....	4
Part II - Nature of Services Required.....	8
Part III - Proposal Requirements.	10
Part IV - Evaluation of proposal.	12
Proposer proposal.	14
Price Proposal.....	15
Debarment, Suspension Certification.....	16
Drug-Free Certification.....	18
Non-Collusion Affidavit.....	19
Non-Discrimination Affidavit.....	20
E-Verify Form	21



OPA-LOCKA CRA
REQUEST FOR PROPOSAL
RFP NO: 23-0615200

**BOOKKEEPING
SERVICES FOR**

OPA-LOCKA COMMUNITY REDEVELOPMENT AGENCY

Sealed proposal for Bookkeeping services for the Opa-locka Community Redevelopment Agency (OCRA) will be received by the OCRA at the Office of the OCRA Clerk, 780 Fisherman St, 4th Floor, Opa-locka, Florida 33054, **Monday, June 26th 2023 by 2:00pm.** Any RFP Package received after the designated closing time will be returned unopened. The OCRA will be accepting proposals by mail, however it is your responsibility to submit your proposal by the due date. In addition, proposal may be submitted via www.demandstar.com (e-bid) by 2:00pm. The address to submit sealed proposal is listed below:

OPA-LOCKA COMMUNITY REDEVELOPMENT AGENCY
Office of the OCRA Clerk
780 Fisherman Street, 4th Floor
Opa-locka, Florida 33054

An original and six (6) copies for a total of seven (7) plus 1 copy of the proposal package on USB Flash Drive in PDF format shall be submitted in sealed envelopes/packages addressed to the OCRA Clerk and marked **RFP for Bookkeeping Services for the Opa-locka Community Redevelopment Agency.**

Proposers desiring information for use in preparing proposal may obtain a set of such documents by visiting the OCRA's website at <https://www.opalockafl.gov/288/Community-Redevelopment-Agency> or www.demandstar.com.

The OCRA reserves the right to accept or reject all proposals and to waive any technicalities or irregularities therein. The OCRA further reserves the right to award a contract to that proposer whose proposal best complies with the **RFP NO: 23-0615200** requirements. Proposers may not withdraw their proposal for a period of ninety (90) days from the date set for the opening thereof.

OCRA Clerk
Tiffany Dallas

City Clerk
Joanna Flores



RFP NO. 23-0615200

BOOKKEEPING SERVICES FOR OPA-

LOCKA COMMUNITY REDEVELOPMENT AGENCY

PART I

PROPOSAL GUIDELINES

Introduction: The Opa-locka CRA is requesting proposals from qualified professional companies to provide **Bookkeeping Services for the Community Redevelopment Agency**.

1-2. Proposal Submission and Withdrawal: The Opa-locka Community Redevelopment Agency (OCRA) will be accepting proposals by mail; however, it is your responsibility to submit your proposal by the due date. In addition, proposals may be submitted via www.demandstar.com (e-bid). The CRA must receive all proposals by 2:00 pm on Monday, June 26th, 2023. The address to submit sealed proposals is listed below:

OPA-LOCKA COMMUNITY REDEVELOPMENT AGENCY
Office of the OCRA Clerk
780 Fisherman Street, 4th Floor
Opa-locka, Florida 33054

To facilitate processing, please clearly mark the outside of the proposal package as follows: **RFP NO. 23-0615200 –BOOKKEEPING SERVICES FOR THE COMMUNITY REDEVELOPMENT AGENCY**. This package shall also include the Proposer’s return address.

Proposers may withdraw their proposal by notifying the CRA in writing at any time prior to the deadline for proposal submittal. After the deadline, the proposal will constitute an irrevocable offer, for a period of 90 days. Once opened, the proposal becomes a record of the OCRA and will not be returned to the Proposer.

The CRA cautions proposers to assure actual delivery of mailed or hand-delivered proposal directly to the OCRA Clerk’s Office at 780 Fisherman Street, 4th Floor, Opa-locka, Florida 33054 prior to the deadline set for receiving proposal. Telephone confirmation of timely receipt of the proposal may be made by calling (305) 953-2868 ext. 1252 before the proposal closing time. Any proposal received after the established deadline **will not** be considered and will be returned unopened to the Proposer(s).

1-3. Number of Copies: Proposers shall submit an **original and six (6) copies (a total of 7) plus one copy on CD in PDF format** of the proposal in a sealed, opaque package marked as noted above. The Proposer will be responsible for timely delivery, whether by personal delivery, US Mail, or any other delivery medium.

1-4. Development Costs: Neither the OCRA nor its representatives shall be liable for any expenses incurred in connection with the preparation of a response to this Request for Qualification. Proposers should prepare their proposal simply and economically, providing a straightforward and concise description of the Proposer’s ability to meet the requirements of the RFP.

1-5. Inquiries: The OCRA Clerk will receive written requests for clarification concerning the meaning or interpretations of the RFP, until eight (8) days prior to the submittal date. OCRA personnel are authorized only to direct the attention of prospective Proposers to various portions of the RFP so that they may read and interpret such for themselves. No employee of the OCRA is authorized to interpret any portion of this RFP or give information as to the requirements of the RFP in addition to what is contained in the written RFP document.

1-6. Addendum: The OCRA may record its response to inquiries and any supplemental instructions in the form of written addenda. The OCRA may mail written addenda up to three (3) calendar days before the date fixed for receiving the proposal. Any oral explanation given before the RFP opening will not be binding.

All Proposers are expected to carefully examine the proposal documents. Any ambiguities or inconsistencies should be brought to the attention of the OCRA's Purchasing Agent through written communication prior to the opening of the proposal.

1-7. Contract Awards: The OCRA anticipates entering into an Agreement with the Proposer who submits the proposal judged by the OCRA to be most advantageous.

The Proposer understands that this RFP does not constitute an offer or an Agreement with the Proposer. An offer or Agreement shall not be deemed to exist and is not binding until proposal are reviewed, accepted by appointed staff.

The OCRA reserves the right to reject all proposals, to abandon the project and/or to solicit and re-advertise for other proposal.

1-8. Contractual Agreement: This RFP and Consultant/Contractor proposal shall be included and incorporated in the final award. The order of contractual precedence will be the Contract or Agreement document, original Terms and Conditions, and Proposer response. All legal action necessary to enforce the award will be held in Miami-Dade County and the contractual obligations will be interpreted according to the laws of Florida. **Any additional contract or agreement requested for consideration by the Proposer must be attached and enclosed as part of the proposal.**

1-9. Selection Process: The proposal will be evaluated and assigned points. The firm with the highest number of points will be ranked first; however, nothing herein will prevent the OCRA from assigning work to any firm deemed responsive and responsible.

The OCRA reserves the right to further negotiate any proposal, including price, with the highest rated Proposer. If an agreement cannot be reached with the highest rated Proposer, the OCRA reserves the right to negotiate and recommend award to the next highest Proposer or subsequent Proposers until an agreement is reached.

1-10. Public Records: Upon award recommendation or ten (10) days after opening, whichever occurs first, proposal becomes "public records" and shall be subject to public disclosure consistent with Chapter 119 Florida Statutes. Proposers must invoke the exemptions to disclosure provided by law in the response to the RFP and must identify the data or other materials to be protected and must state the reasons why such exclusion from public disclosure is necessary. Document files may be examined during normal working hours.

1-11. News Releases: The Proposer shall obtain the prior approval of the OCRA Executive Directors' Office of all news.

releases or other publicity pertaining to this RFP or the service, study, or project to which it relates.

1-12. Insurance: The awarded Proposer(s) shall maintain insurance coverage reflecting at least the minimum amounts and conditions specified herein. In the event the Proposer is a governmental entity or a self-insured organization, different insurance requirements may apply. Misrepresentation of any material fact, whether intentional or not, regarding the Proposers' insurance coverage, policies or capabilities may be grounds for rejection of the proposal and rescission of any ensuing Agreement.

1. Evidence of General Liability coverage with limits not less than \$1,000,000 per Occurrence/ \$2,000,000 Aggregate (Including Policy Number and Policy Period);
2. Evidence of Auto Liability coverage with limits not less than \$1,000,000 per Occurrence/\$1,000,000 Aggregate (Including Policy Number and Policy Period);
3. Evidence of Workers' Compensation coverage with statutory limits and Employer's Liability coverage with limits not less than \$100,000 (Including Policy Number and Policy Period);
4. The OCRA listed as an additional insured (this may be specifically limited to the specific job(s) the contractor will be performing);
5. Minimum 30-day written notice of cancellation.

1-13. Licenses: Proposers, both corporate and individual, must be fully licensed and certified in the State of Florida at the time of RFP submittal. The proposal of any Proposer who is not fully licensed and certified shall be rejected.

1-14. Public Entity Crimes: Award will not be made to any person or affiliate identified on the Department of Management Services' "Convicted Vendor List". This list is defined as consisting of persons and affiliates who are disqualified from public contracting and purchasing process because they have been found guilty of a public entity crime. No public entity shall award any contract to or transact any business in excess of the threshold amount provided in Section 287.017 Florida Statutes for Category Two (currently \$25,000) with any person or affiliated on the "Convicted Vendor List" for a period of thirty-six (36) months from the date that person or affiliate was placed on the "Convicted Vendor List" unless that person or affiliate has been removed from the list. By signing and submitting the RFP proposal forms, Proposer attests that they have not been placed on the "Convicted Vendor List".

1-15. Code Of Ethics: If any Proposer violates or is a party to a violation of the code of ethics of the OCRA or the State of Florida with respect to this proposal, such Proposer may be disqualified from performing the work described in this proposal or from furnishing the goods or services for which the proposal is submitted and shall be further disqualified from submitting any future proposal for work, goods or services for the OCRA.

1-16. Drug-Free Workplace: Preference shall be given to businesses with Drug-Free Workplace (DFW) programs. Whenever two or more proposal which are equal with respect to price, quality, and service are received by the OCRA for the procurement of commodities or contractual services, a proposal received from a business that completes the attached DFW form certifying that it is a DFW shall be given preference

in the award process.

1-17. Permits and Taxes: The Proposer shall procure all permits, pay all charges, fees, and taxes, and give all notices necessary and incidental to the due and lawful prosecution of the work.

1-18. Protests: Protests of the plans, specifications, and other requirements of the request for proposal and bids must be received in writing by the OCRA Clerk's Office at least ten (10) working days prior to the scheduled bid opening. A detailed explanation of the reason for the protest must be included. Protests of the award or intended award of the bid or contract must be in writing and received in the OCRA Clerk's Office within seven (7) working days of the notice of award. A detailed explanation of the protest must be included.

1-19. Termination for Convenience: A contract may be terminated in whole or in part by the OCRA at any time and for any reason in accordance with this clause whenever the OCRA shall determine that such termination is in the best interest of the OCRA. Any such termination shall be affected by the delivery to the contractor at least five (5) working days before the effective date of a Notice of Termination specifying the extent to which performance shall be terminated and the date upon which termination becomes effective. An equitable adjustment in the contract price shall be made for the completed service, but no amount shall be allowed for anticipated profit on unperformed services.

PART II

MINIMUM SPECIFICATIONS

SCOPE OF SERVICES:

2-1. DESCRIPTION OF SERVICES

The purpose of this Request for Proposal is to invite interested professionals and or firms and/or bookkeepers to provide services via a bookkeeping and assessment professional services agreement to ensure that our organization continues to abide by County and State regulations. The CRA Board will award one contract to a single Bookkeeping services provider to work with the finances for the OCRA.

2-2. SCOPE OF WORK

It is the intent of the Opa-locka Community Redevelopment Agency (OCRA) to select a bookkeeper or firm to provide financial services. The objectives are to obtain the best financial services while minimizing the cost to the Agency (OCRA) for the following duties including, but not limited to:

2.2.1. Bookkeeping Service Scope

Input all transactions into the QuickBooks or similar software (transactions are generally under 50 per month collectively), with information on revenue, expenses and receivables provided by staff, Prepare the monthly reconciliation of all banks, vendor, bank cards, special funds, and all other material accounts, maintain a schedule of all fixed assets, prepayments, and unearned revenues, and maintain supporting documentation to monitor and detail all transactions.

2.2.2. Financial Reporting

Prepare a monthly Budget to Actual summary and Budget to Actual detail report out of QuickBooks or similar accounting software.

Prepare monthly Comparative Statements of Financial Position and Statement of Activities reports. Prepare any other reports or statements as requested by the Board or Executive Director.

2.2.3. Policies and Procedures

Develop policies and procedures for contract administration.

Develop guidelines, including standard payment procedures that are used to call for offers from contractors, suppliers, and service providers.

Establish guidelines for payables and receivables.

2.2.4 Tax Reporting

Prepare all required tax filings for related entities and transactions, Prepare all 1099 and 1096 filings and

Prepare any other federal, state, or local tax filings as required.

2..2.5 Budgeting

Provide assistance to the Board and Executive Director with the preparation of an annual budget.

Input the adopted budget into the accounting software.

2-3. Proposal Requirements

The following must be received by the proposal due date. Firm's proposal proposal and Related Public Entity and Development Authority Experience - Sufficient information should be provided regarding proposal of the firm to provide the requested scope of work. Provide a listing of current non-profit and public body clients for which your firm is providing bookkeeping/accounting services.

2-4. Personnel Proposal

Provide sufficient information and related experience of personnel who will perform bookkeeping/accounting services for the Authorities.

2-5. Additional Information

Interested firms are encouraged to provide any additional information not otherwise requested that may aid the OCRA in awarding this professional service contract.

2-6. Fees and Hourly Rates

OCRA prefers a monthly cost for services; please provide projected fixed cost for each of the 4 sections (Bookkeeping, Financial Reporting, Tax Preparation Reporting and Budget) noted above. Again, note that your firm may choose to respond to some elements in the Scope of Work, but not all. Please provide pricing for those services you are prepared to provide.

PART III

PROPOSAL REQUIREMENTS

3-1 RULES FOR PROPOSAL

In order to maintain comparability and enhance the review process, proposals shall be organized in the manner specified below and include all information required herein. The proposal must name all persons or entities interested in the proposal as principals. The proposal must declare that it is made without collusion with any other person or entity submitting a proposal pursuant to this RFP. The following must be received by the proposal due date.

Firm's proposal

Proposal and Related Non-Profit and Public Body Experience

Sufficient information should be provided regarding the proposal of the firm to provide the requested scope of work.

Provide a listing of current non-profit and public entity clients similar to the Authorities for which your firm is providing bookkeeping/accounting services.

Personnel proposal

Provide sufficient information and related experience of personnel who will perform the appropriate bookkeeping/accounting services.

3-2 SUBMISSION OF PROPOSAL

The proposal shall be submitted on 8 ½ "x 11" paper, portrait orientation, with headings and sections numbered appropriately. Ensure that all information is written legibly or typed. The following should be submitted for a proposing firm to be considered:

3.2.1 Cover Page - Show the name of Proposer's agency, accountant/bookkeeper/firm, address, telephone number, name of contact person, date, and the proposal number and description.

3.2.2 Tab 1 - Table of Contents

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

3.2.3 Tab 2 - Letter of Transmittal

Provide general background information about the bookkeeper or firm, with focus on the area(s) of activity in which representation is sought, and as to the size and experience of the firm in these specified areas.

3.2.3.1 Limit to one or two pages.

3.2.3.2 Briefly state the Proposers understanding of the work to be done and make a positive commitment to perform the work.

3.2.3.3 Give the names of the persons who will be authorized to make representations for the Proposer, their titles, addresses and telephone numbers.

3.2.3.4 Provide an official signature of a Corporate Officer certifying the contents of the Proposer's responses to the OCRA's Request for Proposal.

3.2.4 Tab 3 - General Information

3.2.4.1 Name of Business.

3.2.4.2 Mailing Address and Phone Number.

3.2.4.3 Names and contact information of persons to be contacted for information or services if different from name of person in charge.

3.2.4.4 Normal business hours.

3.2.4.5 State if business is local, national, or international and indicate the business legal status (corporation, partnership, etc.).

3.2.4.6 Give the date business was organized and/or incorporated, and where.

3.2.4.7 Give the location of the office from which the work is to be done and the number of professional staff employees at that office.

3.2.4.8 Indicate whether the business is a parent or subsidiary in a group of firms/agencies. If it is, please state the name of the parent company.

3.2.4.9 State if the business is licensed, permitted and/or certified to do business in the State of Florida and attach copies of all such licenses issued to the business entity.

3.2.5 Tab 4 – Project Approach

Describe in detail your proposal to fulfill the requirements of the scope of services listed in section 2.2 of this RFP.

3.2.6 Tab 5 – Experience and proposal

3.2.6.1 State if the business is licensed, permitted and/or certified to do business in the State of Florida and attach copies of all such licenses issued to the business entity.

3.2.6.2 Description of services and approach to bookkeeping/accounting services, particularly accounting for government and restricted funding.

3.2.6.3 Specify the number of years the Proposer has been in business. A minimum of five (5) years in business is required.

3.2.6.4 Identify the Proposer's proposal to perform the services identified in this RFP as listed in section 2-2 Scope of Services.

3.2.6.5 Include resumes, not exceeding one page each, of all key personnel who will be assigned to the OCRA.

3.2.7 Tab 6 – Schedule

3.2.7.1 Include a timetable that identifies the amount of time required to complete each component of the Program.

3.2.7.2 Indicate the earliest available start date for your project team.

3.2.7.3 Indicate the project completion date based on the date provided in 3.2.7.1.

3.2.8 Tab 7 – Pricing of Services

Provide all fees and costs to be charged including hourly rates of any individual(s) that will be involved with advising the OCRA and the rate at which their time will be billed to the OCRA. The hourly rate quoted should include all salary and compensation, and all overhead expenses, profits, and other employee costs, including but not limited to clerical and administrative processing expenses.

3.2.8.1 The fee basis should be an all-inclusive, base fee.

3.2.9 Tab 8 – References

3.2.9.1 List a minimum of three (3) references for which the proposer has provided financial and or bookkeeping services, preferably public entity/government agencies clients, for which the bookkeeping service or firm currently

or has previously served in a similar role. If you have any current or past governmental agencies as customers, you are encouraged to list them, especially those from Broward County or other Florida counties. It is recommended that references be no less than similar in size to the City or have similar services for the City. Provide the names and contact information, including the name of the organization, brief description of the project, name of contact person telephone number and email address.

3.2.10 Tab 9 - Required Disclosures

The following questions must be answered as part of your proposal with respect to the agency regarding this matter.

- Do you have any potential conflicts of interest or any arrangement or relationships, formal or informal, which may interfere with your ability to provide independent, unbiased service to the OCRA?
- Are there any investigations, lawsuits, or administrative proceedings involving you that the OCRA should be aware of in considering your capacity to provide services to the OCRA?

3.2.11 Tab 10 – Additional Forms

Proposers must compete and submit as part of its Proposal all the following forms and/or documents.

- Proposer proposal
- Certification regarding suspension
- Drug Free workplace certification

FAILURE TO SUBMIT ALL OF THE ABOVE REQUIRED DOCUMENTATION MAY DISQUALIFY THE PROPOSER.

**PART IV
EVALUATION OF PROPOSAL**

4-1 SELECTION COMMITTEE

A Selection Committee, consisting of OCRA personnel, will convene, review, and discuss all proposals submitted.

The Selection Committee will use a point formula during the review process to score proposals and assign points in the evaluation process in accordance with the evaluation criteria. The Proposer shall satisfy and explicitly respond to all the requirements of the RFP including a detailed explanation of how the services shall be performed.

Each proposal will be reviewed to determine if the proposal is responsive to the submission requirements outlined in the Solicitation. A responsive proposal is one which follows the requirements of this Solicitation that includes all documents are submitted in the format outlined in this Solicitation, is of timely submission, and has the appropriate signatures as required on each document. Failure to comply with these requirements may result in the proposal being deemed non-responsive. The Contract (s) will be awarded to the proposer whose proposal best serves the interest of and represents the best values to the OCRA.

4-2 EVALUATION CRITERIA

The Committee may select and choose to invite any and/or or all firms to make a presentation and be interviewed by the Committee as part of the evaluation process for this Solicitation. The Committee's decision will be communicated by staff to all Respondents. The Respondent's presentation may clarify but may not modify their submitted proposal. Any discussion between the presenter (s) and Evaluation Committee during presentations is intended only for the purpose of providing clarification in response to questions from the Committee.

Category	Points
Experience and proposal of professional personnel assigned to project. 1. Number of years providing bookkeeping services 2. Proposal and experience of staff 3. Licensing / Capacity to meet CRA's needs in a timely manner. 4. Adherence to requirements, forms and proposal listed in this RFP	35
References 1. Performance of similar services for governmental clients including at least two references	10
Resources and approach 1. Adequate resources 2. Proposed plan and approach to fulfilling scope	30
Price Proposal 1. Cost of proposed services	25
TOTAL	100

4-3 ORAL PRESENTATIONS

Proposers may be required to make individual presentations to the OCRA Selection Committee in order to clarify their proposal. Only those firms with the highest rated scores in accordance with the stated criteria and their weights will be invited to give oral presentations. However, the OCRA has the right to accept the best proposal as submitted, without discussion or negotiation.

If the CRA determines that such presentations are needed, a time and place will be scheduled for oral presentations. Each Proposer shall be prepared to discuss and substantiate any of the areas of the proposal submitted, and its proposal to perform the specified services. During the oral presentations, the Proposers should relate their discussion to the evaluation criteria, which will include (but not be limited to) their approach to the project. The proposed Project Manager must be in attendance.

The Evaluation Criteria may be changed for the oral presentation evaluation phase. References and site visits (if completed) shall be included in the final evaluation criteria, along with other criteria and weights as determined by the Selection Committee. Finalists will be informed as to the revised criteria, if any, prior to their oral presentation.

Additionally, prior to award of an Agreement pursuant to this RFP, the OCRA may require Proposers to submit such additional information bearing upon the Proposer's ability to perform the services in the Agreement as the OCRA deems appropriate.

4-4 FINAL SELECTION

After review by the Selection Committee of the proposal and oral presentations, a recommendation will be made to the Interim Executive Director for submission to the OCRA Board for final approval. OCRA staff will recommend to the OCRA Board to award the Proposer whose Proposal is determined to provide overall best value to the OCRA, considering the evaluation factors in this RFP. The OCRA will select the firm that meets the best interests of the OCRA. The OCRA Board shall be the sole judge of its own best interests, the proposal, and the resulting negotiated agreement. The OCRA Board's decisions will be final.

4-5 AWARD AND CONTRACT EXECUTION

Upon Board authorization, contract negotiations will be initiated with the first ranked firm. If those negotiations are unsuccessful, the OCRA will formally terminate negotiations with the first ranked firm and will commence contract negotiations with the next ranked firm, etc. Upon successful contract negotiations with the prevailing firm, the remaining firms will be notified that the process has been completed and that they were not selected.

CALENDAR EVENTS:

EVENT	DATE/LOCATION	
Release Date	06/04/2023	
Pre-Bid Meeting	N/A	
Written Questions Due	06/15/2023 @ 5:00pm Email questions to jbergel@opalockafl.gov With Subject line "RFP No: Bid Questions"	
Response to Questions	06/19/2023 @ 5:00pm	
Due Date/Bid Opening	06/26/2023 @ 2:00 pm	at: OPA-LOCKA COMMUNITY REDEVELOPMENT AGENCY Office of the OCRA Clerk 780 Fisherman Street, 4th Floor Opa-locka, Florida 33054 OR Electronic Bid on www.Demandstar.com
PHASE 1: 1st Evaluation Committee Meeting (Open to the Public).	TBA	
PHASE 2: (Only if necessary) Shortlist Presentations	TBA	
Committee Ranking (Open Meeting)	TBA	
Contract Negotiations (Closed Meeting)	TBA	
Award Letter Recommendation	TBA	
Post Award	TBA	



**RFP NO. 23-0615200
PROPOSER PROPOSAL**

**BOOKKEEPING SERVICES FOR OPA-LOCKA
COMMUNITY REDEVELOPMENT AGENCY**

The Proposer, as a result of this proposal, MUST hold a County and/or Municipal Contractor’s Occupational License in the area of their fixed business location. The following information MUST be completed and submitted with the proposal to be considered:

1. Legal Name and Address:

Name: _____

Address: _____

City, State, Zip: _____ Phone/Fax: _____

2. Check One: Corporation () Partnership () Individual ()

3. If Corporation, state:

Date of Incorporation: _____ State in which Incorporated: _____

4. If an out-of-state Corporation, currently authorized to do business in Florida, give date of such authorization: _____

5. Name and Title of Principal Officers Date Elected:

_____	_____
_____	_____
_____	_____
_____	_____

6. The length of time in business: _____ years

7. The length of time (continuous) in business as a service organization in Florida:
_____ years

8. Provide a list of at least three commercial or government references that the bidder has supplied service/commodities meeting the requirements of the OCRA specification, during the last twenty-four months.

9. A copy of County and/or Municipal Occupational License(s)

Note: Information requested herein and submitted by the proposers will be analyzed by the OCRA and will be a factor considered in awarding any resulting contract. The purpose is to ensure that the Contractors, in the sole opinion of the OCRA, can sufficiently and efficiently perform all the required services in a timely and satisfactory manner as will be required by the subject contract. If there are any terms and/or conditions that are in conflict, the most stringent requirement shall apply.



**RFP NO: 23-0615200
PRICE PROPOSAL FORM**

**BOOKKEEPING SERVICES FOR
OPA-LOCKA
COMMUNITY REDEVELOPMENT AGENCY**

Firms must use the Cost Proposal below to submit your Firm's cost for this project indicated in the Scope of Service herein.

The OCRA reserves the right to increase, decrease, and/or choose the items and quantities below for the Project to meet its available budget using the hourly rates provided below.

The proposing firm must completely fill out each row below.

Your firm must provide a detailed fee schedule that explains the cost and services for each description of task.

LUMP SUM PRICE: \$_____

Fees/Hourly Rates

The Authorities prefer a monthly cost for services; please provide projected fixed cost for each of the 4 sections (Bookkeeping, Financial Reporting, Tax Preparation Reporting and Budget) noted above. Again, note that your firm may choose to respond to some elements in the Scope of Work, but not all. Please provide pricing for those services you are prepared to provide.

<u>Function</u>	<u>Fixed Fee (Monthly)</u>
Bookkeeping	_____
Financial Reporting	_____
Tax Reporting	_____
Budget	_____
Total Fixed Fee	_____

- Hourly rates of the firm's employees should be provided for services which may be requested outside of the scope of the agreement.

Classification	Hourly Rate
Primary	\$ _____
CPA	\$ _____
Accountant 5+ years of non-profit experience	\$ _____
Accountant (0-4) years of non-profit experience	\$ _____

SUBMITTED THIS _____ DAY OF _____ 2023.

BID SUBMITTED BY:

Company	Telephone Number
Name of Person Authorized to Submit Bid	Fax Number
Signature	Email Address
Title	



OPA-LOCKA CRA

CERTIFICATION REGARDING DEBARMENT, SUSPENSION PROPOSED DEBARMENT AND OTHER MATTERS OF RESPONSIBILITY

1. The Proposer certifies, to the best of its knowledge and belief, that the Proposer and/or any of its Principals:

A. Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency.

B. Have not, within a three-year period preceding this offer, 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) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

C. Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 1-B of this provision.

2. The Proposer has not, within a three-year period preceding this offer, had one or more contracts terminated for default by any City, State or Federal agency.

A. "Principals," for the purposes of this certification, means officers; directors; owners; partners; and persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

B. The Proposer shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Proposer learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

C. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Proposer's responsibility. The failure of the Proposer to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Proposer non-responsive.

D. Nothing contained in the foregoing shall be construed to require establishment of a system of records to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of a Proposer is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

E. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Proposer knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

AS THE PERSON AUTHORIZED TO SIGN THE STATEMENT, I CERTIFY THAT THIS FIRM COMPLIES FULLY WITH THE ABOVE REQUIREMENTS.

Signature _____

Printed Name _____



DRUG-FREE WORKPLACE CERTIFICATION FORM

Whenever two (2) or more bids/ proposal, which are equal with respect to price, quality, and service, are received by the OCRA for the procurement of commodities or contractual services, a bid/proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. To have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of controlled substances is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in number (1).
4. In the statement specified in number (1), notify the employees that as a condition for working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction on or plea of guilty or no contest to any violation of Chapter 893, Florida Statutes or of any controlled substance law of the United States or any singular state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Section 287.087, Florida Statutes.

This Certification is submitted by _____ the
(Name)

_____ of _____
(Title/Position) (Company)

who does hereby certify that said Company has implemented a drug-free workplace program, which meets the requirements of Section 287.087, Florida Statutes, which are identified in numbers (1) through (6) above.

_____ Signature
Date



**OPA-LOCKA CRA
NON-COLLUSION AFFIDAVIT**

STATE OF FLORIDA - COUNTY OF MIAMI DADE

_____ being first duly sworn, deposes and says that:

- (1) He/She/They is/are the _____
(Owner, Partner, Officer, Representative or Agent) of
_____ the proposer that has submitted the attached proposal;
- (2) He/She/They is/are fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;
- (3) Such Proposal is genuine and is not a collusive or sham Proposal;
- (4) Neither the said proposer nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other proposer, firm, or person to submit a collusive or sham Proposal in connection with the Work for which the attached Proposal has been submitted; or to refrain from Proposing in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any proposer, firm, or person to fix any overhead, profit, or cost elements of the Proposal or of any other proposer, or to fix any overhead, profit, or cost elements of the Proposed Price or the Proposed Price of any other proposer, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;
- (5) The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the proposer or any other of its agents, representatives, owners, employees, or parties of interest, including this affiant.

Signed, sealed and delivered in the presence of:

Witness

By: _____
Signature

Witness

Print Name and Title



NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization, business, or entity represented herein shall not discriminate against any person in its operations, activities, or delivery of services under any agreement it enters into with the Opa-locka CRA. The same shall affirmatively comply with all applicable provisions of federal, state, and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

By: _____

Title: _____

Sworn and subscribed before this

____ day of _____, 20____

Notary Public, State of Florida

(Printed Name)

My commission expires: _____



E-VERIFY

Effective January 1, 2021, public and private employers, contractors, and subcontractors will be required to register with, and use of the E-verify system to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/sub-contractors) assigned by Vendor /Consultant/ Contractor to perform work pursuant to the contract with the Department. The Vendor /Consultant/ Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the CRA; and

By entering into a Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of this affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If t contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination. The Contractor acknowledges it is liable to OCRA for any additional costs as a result of termination of the contract due to Contractor's failure to comply with the provisions herein.



E-VERIFY FORM

Definitions:

“Contractor” means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration.

“Subcontractor” means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration.

Effective January 1, 2021, public and private employers, contractors and subcontractors will begin required registration with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security’s E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/subcompanies/subcontractors) assigned by Vendor/Consultant/Contractor to perform work pursuant to the contract with the Department. The Vendor/Consultant/Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security’s E-Verify System during the term of the contract is a condition of the contract with the OCRA; and

Should vendor become successful Contractor awarded for the above-named project, by entering into this Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If this contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination.

Company Name: _____

Authorized Signature: _____

Print Name: _____

Title: _____

Date: _____