

Briarcliff Manor UFSD
45 Ingham Rd, Briarcliff Manor UFSD 10510
914-432-8116

Request for Proposals – Internal Claims Auditor

The Briarcliff Manor Union Free School District, herein referred to as “the District”, invites proposals from qualified individuals and/or firms to perform the internal claims auditor function.

1. Purpose

The District requests quotations from individuals and/or firms interested in performing the internal claims auditor function for the school district. The internal claims audit function will be performed to ensure that all expenditures of school district funds are in accordance with laws, regulations, and district policy.

Proposal Submission

Proposals must be clearly labeled and submitted to the Briarcliff Manor UFSD Business Office located at 45 Ingham Rd, Briarcliff Manor, NY 10510 on or before 3:00 pm prevailing time, on Friday, December 11, 2020 or by email to jbrucato@briarcliffschools.org. There is no expressed or implied obligation for the District to reimburse responding firms for any expenses incurred in preparing proposals or attending an interview in the responding to this request. Proposals submitted after the stated time and date will not be considered.

All proposals must be submitted in two parts. Part I must consist of responses to the qualifications items. Part II must consist of complete contract cost and pricing information. Incomplete submissions will not be considered for award. Proposals should not be excessively long, and should be submitted in a format that permits copying for review. Each page of the proposal must state the firm submitting the proposal, the fact that the RFP is being submitted to Briarcliff Manor UFSD and the page number. All materials submitted in response to this request for proposal shall become property of the District.

Contract Term

The contract shall be in effect for the period of January 1, 2021 thru June 30, 2022 with an option to renew for four additional one-year periods, at the discretion of the Briarcliff Manor Union Free School District, not to exceed the prices indicated in the proposal submission.

2. Scope of Services

Internal Claims Auditor shall:

- Be fully knowledgeable with state and local bidding laws and regulations as well as Board Policies and Regulations.
- Be familiar with the legal requirements associated with General Municipal Law Section 103 and the bidding requirements.
- Be familiar with the practice and use of co-operative bidding, county contracts, and state OGS contracts.

Perform the following duties bi-weekly:

- Review all voucher packets.
- Ensure that each voucher packet includes a purchase order signed by the purchasing agent, a written approval (physical or electronic) and an original invoice.
- Ensure that voucher packets for conference reimbursements include an approved purchase order, and approved authorization to attend such conference, conference literature describing the cost, location, and purpose for attending, a travel request form signed by the individual making the claim, approved by the supervisor and has original, itemized receipts attached.
- Ensure that the invoice clearly describes the goods or services purchased and matches the purchase order.
- Make certain that the invoiced price is comparable to the estimated cost on the purchase order and if the invoice cost is more than \$25.00 above the purchase order that the purchasing agent has approved the increased cost.
- Ensure that the district does not pay any sales tax unless applicable.
- If the expenditure is one that requires bidding, make certain there is evidence that the merchandise was bid either by the school district or through a cooperative bid or state contract.
- If the expenditure is one that does not require bidding, make certain there is evidence that the purchase is in compliance with school district policy.
- Review all voucher packets for their reasonableness.
- Confirm that signatures are those that are approved by Board Policy or administrative regulation.
- Verify, on a sample basis, that extensions are correct.
- Compare actual check to documents of voucher packet approved.
- Execute the Certification of the Warrant.

Perform the following duties:

- Provide reports, verbal and/or written to the Board of Education, monthly.

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Part I – Qualifications

In setting forth qualifications, the following should be submitted:

- A description of business/ school district experience and expertise focusing on internal claims auditing.
- Identify the nature of any potential conflict of interest in providing these services to the district.
- Provide engagements in which the duty of internal claims auditing has been performed within the past thirty-six (36) months.
- Provide any other information that might be beneficial to the District in considering qualifications.

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Part II – Cost and Terms

1. Cost

State the **hourly** rate you are quoting for the following fiscal years:

2020-2021: \$ _____ /hr
2021-2022: \$ _____ /hr
2022-2023: \$ _____ /hr
2023-2024: \$ _____ /hr

2. Interview

The award process may include an interview with district administration and/or the Briarcliff Manor UFSD Audit Committee.

3. Termination of Contract

Any contract agreed to under this Request for Proposal is subject to termination by either party with thirty (30) days written notice. In the event of termination of the contract, the District’s responsibility shall be to pay for unpaid services performed.

4. Right to Reject Request for Proposal

The District reserves the right to reject without prejudice any and all proposals received under the Request for Proposal.

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District Information

Accounting Funds Maintained: General Fund
Special Aid Fund
School Lunch Fund
Trust and Agency Fund
Capital Fund
Debt Service Fund
Private Purpose Trust Fund

Checks Processed: An average of 224 accounts payable checks per month

Purchasing: Approximately 1,376 purchase orders annually.
Cooperative bids with Putnam North Westchester BOCES,
Southern Westchester BOCES, Educational Data,
as well as New York State contracts are utilized by the
District.

2020-2021 Operating Budget: \$53,381,866