

**EAST ISLIP UNION FREE SCHOOL DISTRICT  
1 CRAIG B. GARIEPY AVENUE  
ISLIP TERRACE, NEW YORK**

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**REQUEST FOR PROPOSALS  
LEGAL SERVICES OF BOND COUNSEL**

**RFP OPENING: Thursday, February 26, 2026 at 11:00 A.M.**

To All Proposers:

The Board of Education of the East Islip Union Free School District is requesting sealed proposals for legal services of bond counsel for the East Islip Union Free School District. The District will receive sealed proposals, at or prior to 11:00 a.m. on Thursday, February 26, 2026. Proposals received after the stated date and time will be returned to the sender unopened. Proposals must be submitted in a sealed envelope plainly marked on the outside:

**EAST ISLIP UNION FREE SCHOOL DISTRICT  
RFP: 2026-2027 Legal Services of Bond Counsel**

Proposals will be received until the above stated hour of prevailing time and date at the School District Administration Offices, 1 Craig B. Gariepy Avenue, Islip Terrace, New York 11752, at which time and place all proposals will be opened. Proposals shall be addressed to the attention of Jenny Bejarano, Purchasing Agent. Proposals may be obtained at the same office beginning on February 5, 2026, Monday through Friday between the hours of 8:30 a.m. and 4:00 p.m., excluding holidays.

Proposals shall be irrevocable for a minimum period of forty-five (45) days from the date of proposal opening. Alterations to said proposals must be submitted in writing. Consideration shall be given only to those alterations, which may be caused by unforeseen circumstances beyond the control of the firm submitting said proposal. The Assistant Superintendent for Business, Mr. Stephen D. Harrison, or his designee, shall make such determination.

The Board of Education of the East Islip Union Free School District intends to award a contract as in its best interest and reserves the right to reject any or all proposals it receives as a result of this RFP, to negotiate with all qualified Proposers, or to cancel this RFP in part or in its entirety, if it is in the best interest of the East Islip Union Free School District to do so. No Proposer shall have any legal, equitable or contractual rights of any kind arising out of its submission of a proposal.

Please read the attached material carefully before submitting your proposal. Incomplete proposals may not be considered.

By: Board of Education  
East Islip Union Free School District

EAST ISLIP UNION FREE SCHOOL DISTRICT

REQUEST FOR PROPOSALS

BOND COUNSEL LEGAL SERVICES

RFP OPENING: Thursday, February 26, 2026 at 11:00 A.M.

I. PURPOSE

The East Islip Union Free School District (hereinafter referred to as “the District”) invites quotations from qualified firms to provide the legal services of District bond counsel. Proposers must be willing to tailor legal services to meet the specific needs of the District, its diverse operations, financial goals and missions.

II. RECEIPT OF PROPOSALS

An original and one (1) copy of the proposal must be submitted to Ms. Jenny Bejarano, Purchasing Agent. Envelopes must be clearly marked “**2026-2027 RFP for Legal Services of Bond Counsel**” and the name and address of the Proposer. Proposals must be received no later than 11:00 a.m. on Thursday, February 26, 2026 and shall be addressed as follows:

Ms. Jenny Bejarano  
Purchasing Agent  
East Islip Union Free School District  
1 Craig B. Gariepy Avenue  
Islip Terrace, New York 11752

There is no express or implied obligation for the District to reimburse responding firms for any expenses incurred in preparing proposals, attending pre-proposal conferences, or interview(s) in responding to this request. Proposals submitted after the stated time and date will not be considered and will be returned to the proposer unopened.

III. SCOPE OF SERVICE

A. **General Responsibilities**

Bond Counsel will provide legal services to the East Islip Union Free School District concerning bond financing, tax, official statement and other debt-related legal matters. Proposals should include the following information:

1. A description of how your firm would act as bond counsel to the East Islip Union Free School District on Tax Anticipation Notes (“TANs”), Bond Anticipation Notes (“BANs”) and Serial Bond issues.
2. A description of what your firm can do to advise the District in connection with the District’s dealings with credit rating agencies, its fiscal/municipal financial

advisor, and other organizations involved in the School District's borrowing process.

3. A description of the proposed services your firm would provide to the District.
4. A full disclosure of your firm's fee schedule for provision of legal advice and counsel and all other services encompassed in representing the District as bond counsel.
5. A full description of disbursements and other costs associated with the services your firm proposes to provide.
6. Any other information you believe is relevant to the District's evaluation of your firm's qualifications.

**B. Responsiveness and Time Requirements**

1. The firm selected is expected to have qualified staff available by both telephone and electronic mail for consultation during normal business hours.
2. The District may require regular or periodic in-District consultation or meetings.
3. The District is unable to predict the total amount of time that may be required of the firm. The firm selected will be expected to provide services as required throughout the year.
4. Attend Board of Education meetings on weekday evenings as may be necessary.

**IV. PROPOSAL SUBMISSIONS**

All proposals must be submitted in two parts. Part 1 must consist of responses to the management and qualifications items. Part 2 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 by the Board of Education. Only two copies of each proposal will be accepted, one copy titled "ORIGINAL" and the second titled "COPY." Each page of the quotation must state the firm submitting the proposal, the fact that the RFP is being submitted to East Islip Union Free School District and the page number. All materials submitted in response to this request for proposal shall become the property of the District.

**PART 1 - Management and Qualifications**

In setting forth its qualifications, each firm submitting a quotation shall:

- a) Provide the name of the firm as well as a brief description of its business activities and history.
- b) Provide information on how long the firm has been in business and length of its experience in providing bond counsel services to school districts.
- c) Identify the firm's professional staff members who specifically will be involved in this engagement, the experience each possesses, and the location of the office from which they work. Provide a detailed biography and/or résumé outlining the experience and credentials of all staff members who will provide services.
- d) Provide a listing and description of similar contracts and/or engagements awarded with other organizations giving dates of service.
- e) Provide the name and title of person(s) submitting the proposal, the firm's main office address, and primary and secondary points of contact and their telephone and fax numbers.
- f) Detail the experience your firm and its staff have in working with public sector and/or municipal clients. Describe how needs specific to the public sector or municipality were met. Highlight any experience specific to school districts.
- g) Provide at least three (3) client references from similar services. Include contact names, addresses and telephone numbers.
- h) Provide any additional information that you feel would distinguish your firm in its service to the District or is particularly, relevant to the District.

## **PART 2 - Cost**

Each firm submitting a proposal shall:

- a) Submit a cost proposal for the services described herein. The cost proposal must be an all-inclusive amount for the full range of services required for one (1) year under the contract. Said cost proposal shall indicate the cost per \$1,000 principal amount issued for: (1) Tax Anticipation Notes, (2) Bond Anticipation Notes; (3) Bonds; and review of and consultation concerning the District's Official Statement. Indicate the cost for any other types of financings or borrowings. Although the initial term of this engagement is one year, the District is requesting that cost proposals also include the all-inclusive amount for each renewal year for up to four (4) additional one-year terms, should the Board exercise such renewal.

- b) Any matters proposed to be separately billed must be specifically identified in the proposal. Each firm responding to this Request for Proposal shall submit a proposed rate for all matters not included in paragraph (a) above. Additional billing may be allowed for other reasonably incurred expenses such as filing fees, court fees, arbitration fees, stenographic fees, Westlaw/Lexis charges and/or travel. No additional billing will be allowed for parking, participant materials, or other incidentals.
- c) Proposer may include in its proposal items not specified in this RFP, which it would consider pertinent. All such alternatives must be listed separately from the proposal and the cost thereof must be separate and itemized.
- d) Provide any other relevant information that will assist the District in evaluating your Proposal.

**V. BACKGROUND**

The following is a brief description of the District: Brief Description of the District

- Schools: East Islip High School, East Islip Middle School, Connetquot Elementary School, John F. Kennedy Elementary School, Ruth C. Kinney Elementary School, Timber Point Elementary School.
- Board of Education is comprised of five (5) voting members and one (1) ex-officio student member.
- Financial Management:
  - Superintendent of Schools: Mr. Paul Manzo
  - Assistant Superintendent for Business: Mr. Stephen D. Harrison
  - Internal Auditor: Cullen & Danowski, LLP
  - Independent Auditor: EFPR Group CPAs, PLLC
  - District Treasurer: Jessica Perticone
  - Audit Advisory Committee
- Budget: District voters approved the 2025-2026 Budget of \$129,013,061. A proposition for transportation was also approved by the voters adding \$331,089 to the budget amount.

**VI. PROPOSAL EVALUATION**

A. Proposals received will be evaluated and scored by the Superintendent of Schools, the Assistant Superintendent for Business and any other officer or administrator selected by the Superintendent of Schools or the Board of Education. Proposals shall be evaluated based upon the criteria set forth below.

Once all proposals are evaluated and scored, the District will make a recommendation to the Board of Education for contract award.

B. Criteria will be rated on a scale of 1-10, with higher scores indicating greater degree of approval by the evaluation team.

C. The evaluation process is designed to award the proposal not necessarily to the Proposer of least cost, but rather to the Proposer with the best combination of attributes based on the evaluation criteria. A score shall be calculated for each criterion for each proposal.

D. Criteria are as follows:

- Proposer's comprehension of the required (work) Scope of Services
- Prior experience in similar projects
- Professional Qualifications
- Total proposed price
- Proposer's demonstrated capabilities (equipment, financial solvency, Location)
- Length of time in business
- Client references
- Staffing - (Evaluation of Employees' Résumés)

## **VII. INTERVIEW**

The evaluation and award process may include an interview, which shall be determined at the sole discretion of the District.

## **VIII. SPECIFICATION CLARIFICATION/INQUIRIES**

All inquiries with respect to this Request for Proposal must be in writing and directed as follows:

Mr. Stephen D. Harrison  
Assistant Superintendent for Business  
East Islip Union Free School District  
1 Craig B. Gariepy Avenue  
Islip Terrace, New York 11752  
Email: [sharrison@eischools.org](mailto:sharrison@eischools.org)

## **IX. FINANCIAL STATEMENT OF THE CORPORATION**

Proposers shall submit the most recent financial statement for the company/firm. The District reserves the right to use third party companies to verify financial information provided. In addition, East Islip Union Free School District may make such investigations it

deems necessary to determine the ability of the Proposer to perform the services described herein. The Proposer shall furnish to the District within five (5) days of a request, all such information and data for this purpose as may be requested. The District reserves the right to reject any Proposal if the information submitted by, or investigation of, such Proposer fails to satisfy the District that such Proposer is properly qualified to carry out the obligations of the contract and to complete the work contemplated therein. Conditional Proposals will not be accepted.

#### **X. FREEDOM OF INFORMATION LAW**

The New York State Freedom of Information Law as set forth in Public Officers Law, Article 6, mandates public access to government records. However, proposals submitted in response to this RFP may contain technical, financial background or other data, public disclosure of which could cause substantial injury to the Proposer's competitive position or constitute a trade secret. Proposers who have a good faith belief that the information submitted in their proposals is protected from disclosure under the New York Freedom of Information Law must clearly identify the pages of the proposals containing such information by typing in bold face on the top of each page, **'THE PROPOSER BELIEVES THAT THIS INFORMATION IS PROTECTED FROM DISCLOSURE UNDER THE STATE FREEDOM OF INFORMATION LAW.'** The District assumes no liability for disclosure of information so identified, provided that the District has made a good faith legal determination that the information is not protected under applicable law or where disclosure is required to comply with an order or judgment of a court of competent jurisdiction.

#### **XI. RIGHT TO REJECT REQUESTS FOR PROPOSAL**

The District reserves the right to reject any and all proposals received under this Request for Proposal.

#### **XII. INDEMNIFICATION**

The following clause shall be included in any agreement between the District and the successful Proposer:

The successful Proposer shall defend, indemnify and save harmless the District, its officers, employees and agents, from and against all claims, damages, losses and expenses (including without limitations, reasonable attorneys' fees) arising out of, or in consequence of, any negligent or intentional act or omission of the successful Proposer, its employees or agents, to the extent of its or their responsibility for such claims, damages, losses and expenses.

#### **XIII. TERM OF CONTRACT**

**Contract Period: July 1, 2026 through June 30, 2027.** This engagement shall be for one (1) year, with the option to renew for additional one year periods upon approval of the Board of

Education for each year, at its sole discretion. This Proposal will be utilized on an “as-needed” basis. There is no guarantee that any/all of the services listed will be utilized.

**XIV. INSURANCE**

Professional Errors & Omissions Insurance shall be provided by the successful Proposer covering the consultant for errors and omissions resulting from services performed for the District. Coverage shall be in the amount of \$2,000,000 per occurrence, \$2,000,000 aggregate. If coverage is provided on a “Claims-Made” basis and a retroactive date is used, the retroactive date must precede the commencement of work for the District. Coverage shall remain in effect for two (2) years following the completion of the services under this contract.

**XV. TERMINATION CLAUSE**

The following clause shall be included in any agreement between the District and the successful Proposer:

This agreement may be terminated upon written notice by the District at any time during the term of said agreement for any cause whatsoever with the fee due and owing the firm to be prorated based on the period of time the agreement was in force and effect up to and including the date of termination, unless any such costs are in dispute.

NAME & ADDRESS OF FIRM: \_\_\_\_\_  
(Please Print)

\_\_\_\_\_  
\_\_\_\_\_

FEDERAL EMPLOYER ID #: \_\_\_\_\_

TELEPHONE NUMBER: ( ) \_\_\_\_\_

FAX NUMBER ( ) \_\_\_\_\_

SIGNATURE & TITLE: \_\_\_\_\_

\_\_\_\_\_  
Please Print Name                      Date

NO CONTRACT BECOMES BINDING UNTIL THE NECESSARY FUNDS HAVE BEEN APPROVED FOR THE FISCAL YEAR DURING WHICH THE CONTRACT IS IN EFFECT.

**EAST ISLIP UNION FREE SCHOOL DISTRICT  
1 CRAIG B. GARIOPY AVENUE  
ISLIP TERRACE, NEW YORK**

\_\_\_\_\_  
REFERENCES

*Company Name:* \_\_\_\_\_

*Address:* \_\_\_\_\_

*Contact Person:* \_\_\_\_\_

*Telephone: ( )* \_\_\_\_\_

*Dates of Contract(s)* \_\_\_\_\_

*Company Name:* \_\_\_\_\_

*Address:* \_\_\_\_\_

*Contact Person:* \_\_\_\_\_

*Telephone: ( )* \_\_\_\_\_

*Date of Contract(s)* \_\_\_\_\_

*Company Name:* \_\_\_\_\_

*Address:* \_\_\_\_\_

*Contact Person:* \_\_\_\_\_

*Telephone: ( )* \_\_\_\_\_

*Date of Contract(s)* \_\_\_\_\_

*Proposer's Name:* \_\_\_\_\_

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**AFFIDAVIT OF COMPLIANCE**

**STATE OF:**

**COUNTY OF:**

\_\_\_\_\_, being duly sworn, deposes and says:

- 1) That (s)he is an officer or representative of \_\_\_\_\_ and that (s)he has the authority to sign this affidavit.
- 2) This affidavit is offered as an inducement to the District to award to \_\_\_\_\_ such contracts for services as directed by the Board of Education, in accordance with New York State law and with District policy.
- 3) That no Officer, Employee or Stockholder of the above referenced vendor is an Employee, in any position, Administrator or Board Member at the East Islip Union Free School District.
- 4) That no Officer, Employee or Stockholder of the above-referenced vendor is related to an employee in any position, Administrator or Board Member, at the East Islip Union Free School District other than as disclosed below:

Vendor: List Officer, Employee or Stockholder's Name	Position with Vendor	District Employee, Administrator or Board Member Name	Relationship between parties

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Date

Sworn to before me this \_\_\_\_\_  
Day of \_\_\_\_\_, 20\_\_

\_\_\_\_\_  
Notary Public