

Addison Central School District
7 Cleveland Drive, Suite 101 • Addison, NY 14801-1398
(607) 359-2245 • Fax (607) 359-4480

Rich Everly
School Business Administrator



*Committed to
Student Success*

Office of the State Comptroller's Office:

Thank you for your feedback regarding Addison Central School District's solicitation of requests for proposals for professional services. We appreciate your interest in our operations and welcome your unique perspective.

We are especially thankful for your comments and suggestions regarding our district's current policy related to contracts for professional services which includes very restrictive language requiring request for proposals every five years for all professional services. We agree with the Office of the State Comptroller's auditors that this policy should be modified and have already taken the initial step of discussing this publicly with the Board of Education, on 3/14/2023. We then plan to modify our formal Board policy accordingly. This policy will be going to the Board for a first read and review on 3/28/2023, with an anticipated adoption date of 4/17/2023.

Conversely, the district has developed a good working relationship with many of our professional service vendors over time, which assists the service provider in being more efficient and effective in completing projects. Our vendors have also developed specialized expertise, customized to the needs of the district, which can be difficult for new vendors to replicate the cost savings to the district.

The district will review our list of current professional services and create a schedule of anticipated request for proposals.

Thank you again for bringing this matter to our attention, and please do not hesitate to reach out to us with any further concerns or suggestions.

A handwritten signature in black ink, appearing to read 'Rich Everly'.

Rich Everly

School Business Official

3/29/2023



Corrective Action Plan

Addison Central School District

Procurement of Professional Services

2023M-6

Audit Recommendation:

Use an RFP process to solicit competition when procuring professional services, as required by District policy and applicable statute.

Implementation Plan of Actions:

- a) Update official Board policy to remove restrictive language after a conversation with representatives of the Office of the State Comptroller during the exit interview of the RFP audit. The following language will be removed from Board policy #6741: *The district will periodically, but not less frequently than every five years issue professional service RFPs and may conduct interviews as part of the RFP process. The written proposals submitted by applicants shall be maintained for at least six years.*

Additional information will be added to the policy for further clarification on professional service: *Professional services are generally those services that require specialized skills, training, professional judgment, expertise, and creativity. Examples include attorneys, architects, and engineers. The procurement of professional services falls within an exception to competitive bidding. In order to procure professional services, the district will use the request for proposals (RFP) process as set forth in General Municipal Law in order to protect the District's interests and to avoid the appearance of favoritism or impropriety. Although not necessarily bound to select the lowest bidder in response to its RFP, the District will adequately document its selection process to demonstrate its economical and prudent use of public monies and to ensure fair competition.*

- b) The district will develop and implement a plan for the submission of requests for proposals on an annual basis. A minimum of (2) request for proposals will be submitted on an annual basis.

Implementation Date:

- c) Update of Board Policy #6741: The policy went to the Board for a first read and review on 3/28/2023 and was adopted on April 19, 2023.
- d) Timeline for submission of request for proposals: two requests for proposals were submitted in May and June of 2023. They will be for Auditing Services and District Insurance Carrier. This was completed on or before July 5, 2023. On an annual basis thereafter, a minimum of (2) requests for proposal will be submitted.

Person Responsible for Implementation:

Under the direction of the Superintendent, the Executive Director of Finance & Operations will decide, on a rotating basis, which professional services will be solicited in any given year. The completion of (2) request for proposals in each school year will be the minimum number of solicitations on an annual basis.



Rich Everly

Executive Director of Finance & Operations

7/14/2023