



Agenda Item Details

Meeting	Jun 26, 2023 - Regular Meeting
Category	7. Consent Agenda
Subject	7.20 Renewal of ITB 18-22 Services to Inventory Capitalized Property, presented by Vince Windham, Program Director, Purchasing, and recommended by the Superintendent for approval.
Access	Public
Type	Action (Consent)
Budget Source	General Funds, Project 9015 Fixed Charges
Recommended Action	Motion to approve renewing ITB 18-22 Services to Inventory Capitalized Property with OHC Advisors, Inc. based on revised bid pricing, effective July 1, 2023, through June 30, 2028.

Public Content

Request approval to renew ITB 18-22 Services to Inventory Capitalized Property with OHC Advisors, Inc. based on revised bid pricing decreasing the annual amount due to the approved increase of the district's threshold for recording property. Funds will be paid from General Funds, Project 9015 Fixed Charges. The five (5) year contract is effective July 1, 2023, through June 30, 2028, and copies of the renewal documents are attached.

For additional information, please contact Melissa O'Malley, Director, Accounting & Finance, at (850) 833-5818.

RENEWAL DOCUMENTS.pdf (406 KB)

Administrative Content

Our adopted rules of Parliamentary Procedure, Robert's Rules, provide for a consent agenda listing several items for approval of the Board by a single motion. Documentation concerning these items have been provided to all Board members and the public in advance to assure an extensive and thorough review. Items may be removed from the consent agenda at the request of any board member.

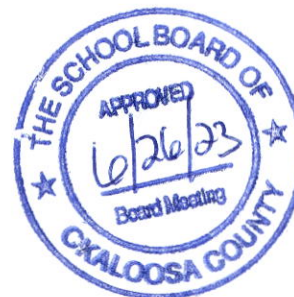
Motion & Voting

Motion to approve the Consent Agenda and all of the Consent Agenda items as recommended by the Superintendent.

Motion by Tim Bryant, second by Marti Gardner.

Final Resolution: Motion Carries

Yes: Tim Bryant, Linda Evanchyk, Marti Gardner, Diane Kelley, Lamar White

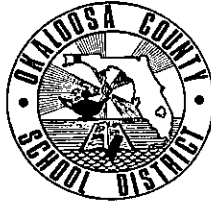


SCHOOL DISTRICT OF OKALOOSA COUNTY
Purchasing Department

SUPERINTENDENT OF SCHOOLS
MARCUS D. CHAMBERS

ATTORNEY TO THE BOARD
C. JEFFREY McINNIS, ESQ.

PGM. DIRECTOR - PURCHASING
VINCE WINDHAM, CPPB



BOARD MEMBERS
TIM BRYANT
MARTI GARDNER
LINDA EVANCHYK
DIANE KELLEY
LAMAR WHITE

June 9, 2023

OHC Advisors, Inc
ATTN: Scott Hodges
14221 SW 120th St, Ste 229
Miami, FL 33186

Mr. Hodges,

On August 13, 2018, the School Board of Okaloosa County, Florida approved the award of ITB 18-22 Services to Inventory Capitalized Property with your organization. The original contract term was for the period of August 18, 2018 through June 30, 2023.

Bid terms state that the contract term of this bid, upon mutual agreement of the parties, may be extended for an additional five-year term. We would like to request that this bid be extended for the period of July 1, 2023 through June 30, 2028.

The School Board of Okaloosa County approved an increase for recording property on October 24, 2022. The limit for property went from \$1,000 per item to \$5,000 per item. This threshold increase has reduced the number of items in our inventory to approximately 1,540 items. Due to the reduced number of items, we have negotiated a revised price of \$13,000 annually. The cost for the change of Custodians is to remain the same at \$30 per hour.

Please check one of the responses below indicating your decision regarding this request. Please sign and return this letter, along with a completed copy of the enclosed Federal Debarment Certification and Scrutinized Company Certification to my attention no later than Monday, June 12, 2023. Feel free to fax your response to (850) 833-6327, or email to shanna.duncan@okaloosaschools.com.

Thank you for your consideration. We look forward to doing business with you for another year.

A handwritten signature in black ink, appearing to read "Vince Windham".

Vince Windham
Program Director of Purchasing

I agree to renew the contract adhering to the original terms and conditions for an additional period of July 1, 2023 through June 30, 2028.

I decline to renew the contract for an additional five-year period.

Signature*: Title: VP of Fixed Assets

Print Name: Scott Hodges Date: 6/9/2023

*Note: Must be signed by an officer or employee having the authority to bind the company or firm.

PURCHASING DEPARTMENT - ADMINISTRATIVE COMPLEX - 120 LOWERY PLACE S.E.
FORT WALTON BEACH, FLORIDA 32548
TELEPHONE (850) 833-7668 FAX (850) 833-6327

TABULATION AND RECOMMENDATION FOR ITB 18-22 SERVICES TO INVENTORY CAPITALIZED
PROPERTY - ACCOUNTING DEPT. - REVISED 6/26/2023

Item #	Item Description	Accountable Assets, Inc.	CBIZ Valuation Group, LLC	Records Consultants, Inc.	OHC Advisors, Inc.	ProBar
1	Bid Price August 14, 2018 - June 30, 2019	\$19,500.00	\$69,300.00	\$81,000.00	\$18,000 \$13,000	\$46,440.00
1A	Bid Price per Hour for Change of Custodian	\$35.00	\$165.00	\$135.00	\$30.00	\$45.00
2	Bid Price July 1, 2019 - June 30, 2020	\$19,500.00	\$69,300.00	\$58,000.00	\$18,000 \$13,000	\$41,440.00
2A	Bid Price per Hour for Change of Custodian	\$35.00	\$165.00	\$135.00	\$30.00	\$44.00
3	Bid Price July 1, 2020 - June 30, 2021	\$19,500.00	\$73,400.00	\$58,000.00	\$18,000 \$13,000	\$41,440.00
3A	Bid Price per Hour for Change of Custodian	\$35.00	\$170.00	\$135.00	\$30.00	\$44.00
4	Bid Price July 1, 2021 - June 30, 2022	\$19,500.00	\$73,400.00	\$58,000.00	\$18,000 \$13,000	\$41,440.00
4A	Bid Price per Hour for Change of Custodian	\$35.00	\$170.00	\$135.00	\$30.00	\$44.00
5	Bid Price July 1, 2022 - June 30, 2023	\$19,500.00	\$75,000.00	\$58,000.00	\$18,000 \$13,000	\$41,440.00
5A	Bid Price per Hour for Change of Custodian	\$35.00	\$170.00	\$135.00	\$30.00	\$44.00
	Included Action Plan ?	Yes	Yes	Yes	Yes	Yes
	Addendum #1 Signed	Yes	Yes	Yes	Yes	Yes

BIDDERS WHO BID "NO BID": None

NON-RESPONSIVE BIDDERS: None

RECOMMENDATION FOR AWARD:

Committee: Melissa O'Malley, Director Acct/FS
Kenn MacDonald, AP Specialist

Rita Scallan, CFO

Committee recommends award to the lowest responsible and responsive bidder OHC Advisors, Inc. in the amount of ~~\$18,000.00~~ \$13,000.00 (Annual Cost) and \$30.00 per hour for Change of Custodian.

FUNDING

<u>Fund</u>	<u>Function</u>	<u>Object</u>	<u>Center</u>	<u>Project</u>
1010	7500	0310	9015	9015

"Failure to file a protest within the time prescribed in Florida Statutes 120.57, Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes."

POSTED: 8/2/18 8:00 AM