


<b>Request for Proposals</b>	 <p style="text-align: center;"> <b>Marshall University</b>  <b>Office of Purchasing</b>  <b>One John Marshall Drive</b>  <b>Huntington, WV 25755-4100</b>                  Direct all inquiries regarding this order to: (304) 696-2599             </p>	<p style="text-align: center;"><b>PROPOSAL #</b></p> <p style="text-align: center;">MU21PAUDIT Addendum #2</p>
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<b>Vendor:</b>          <b>FEIN/SSN:</b>	<b>Phone:</b>     <b>Fax:</b>	<b>For information contact: Purchasing</b> <b>Contact:</b> Angela White Negley <b>Email:</b> <a href="mailto:negley4@marshall.edu">negley4@marshall.edu</a> & <a href="mailto:purchasing@marshall.edu">purchasing@marshall.edu</a> <b>Phone:</b> (304) 696-2599
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Sealed requests for proposals furnishing services described below will be received by the Institution. TO RECEIVE CONSIDERATION FOR AWARD, UNLESS OTHERWISE NOTED, THE PROPOSAL WILL BE SUBMITTED IN BONFIRE ON OR BEFORE THE DATE AND TIME SHOWN FOR THE PROPOSAL OPENING. The Institution reserves the right to accept or reject proposals separately or as a whole, to reject any or all proposals, to waive informalities or irregularities and to contract as the best interests of the Institution may require. PROPOSALS ARE SUBJECT TO THE GENERAL TERMS AND CONDITIONS AS SET FORTH HEREIN.

<b>DATE</b> 11/11/2020	Pre-proposal/bid meeting 11/16/2020 @10 a.m. EST	<b>DEPARTMENT REQUISITION NO.</b>	<b>BIDS OPEN:</b> 11/30/20 @ 3:00 pm. EST	<b>BIDDER MUST ENTER DELIVERY DATE FOR EACH ITEM BID</b>
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Item #	Quantity	Description	Unit Price	Extended Price
		<p style="text-align: center;"><u>Addendum #2</u></p> <p>Project: Marshall University's Purchasing Performance Audit</p> <p>Date: November 30, 2020 Time: 3:00pm EST</p> <p>The purpose of this addendum is to modify and/or clarify project requirements as per the attached information. The updated information must be taken into account in preparing proposals and shall become a part of the final contract documents.</p> <p>Receipt of this addendum must be acknowledged in the space provided on this front page and within this addendum, see page 5.</p>		

**Total**

**To the Office of Purchasing,**

In compliance with the above, the undersigned offers and agrees, if this offer is accepted within \_\_\_\_\_ calendar days (30 calendar days unless a different period is inserted by the purchaser) from the bid open date, specified above, to furnish any or all items upon which prices are offered, at the price set opposite each item, delivered at the designated point(s), within the time specified.

Bidder guarantees shipment from \_\_\_\_\_ within \_\_\_\_\_ days

FOB \_\_\_\_\_ After receipt of order at address shown

Terms \_\_\_\_\_

Bidder's name Vendor \_\_\_\_\_

Signed By \_\_\_\_\_

Typed Name \_\_\_\_\_

Title \_\_\_\_\_

Street Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Date \_\_\_\_\_ Phone \_\_\_\_\_

**SOLICITATION NUMBER: MU21PAUDIT**  
**MARSHALL UNIVERSITY PURCHASING PERFORMANCE AUDIT**

**Addendum Number: No. 02**

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The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

**Applicable Addendum Category:**

- Modify bid opening date and time
- Modify specifications of product or service being sought
- Attachment of vendor questions and responses
- Attachment of pre-bid sign-in sheet
- Correction of error
- Other

**Description of Modification to Solicitation:**

Addendum issued to publish and distribute the attached documentation to the vendor community.

1. To answer bidders' preliminary questions.

**NO OTHER CHANGES.**

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith and is specifically incorporated herein by reference.

**Terms and Conditions:**

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Q1. Section 4: 4.2.2.1.1 – We are a CPA Firm and a Partnership and do not have audited financial statements. What are you willing to accept in place of audit financial statements?

4.2.2.1 Mandatory Requirement 1: Firm’s Financial Capability

4.2.2.1.1 Firm must submit a copy of the most recent audited comparative financial statements that have been prepared in accordance with general accepted accounting principles (GAAP). At a minimum, this information must include comparative income statement and balance sheet information for the three (3) most recent years for which audited financial statements have been completed.

**(A1) Internal Financial Statements, that have been certified by the Managing Partner of the CPA Firm, would be acceptable.**

Q2. Section 4: 4.2.2.2.3 and 4.2.2.2.4 – Are you looking for these to be the same accounts/references or should we provide a different list for each?

4.2.2.2 Mandatory Requirement 2: Corporate Experience

4.2.2.2.3 Firm must provide a current list of at least three (3) active contracted accounts (preferably Higher Education Clients) of comparable size, dollar volume in gross sales and number of transactions.

4.2.2.2.4 Provide references for prior projects. Each reference provided must include the name, address, fax number, e-mail address and telephone numbers of the main contact person on these accounts, information as to the contract and its duration.

**(A2) 4.2.2.2.3 would be clients of comparable complexity to Marshall. 4.2.2.2.4 would be for clients whom the same or very similar work has been performed**

Q3. Attachment A “Cost Sheet” – Will expenses be reimbursable, or should they be included as part of the fee?

MU21PAUDIT ATTACHMENT A

MU21PAUDIT PRICE SHEET

ITEM NAME	PER HOUR RATE	ESTIMATED HOURS	UNIT PRICE
INTERVIEW, DATA COLLECTION UPDATE			
COMPLIANCE AUDIT			
PERFORMANCE REVIEW			
DRAFT AND FINAL REPORT			
OTHER			

Insert pricing into the Bonfire portal Excel Sheet. If submitting a hard copy, place the pricing information under separate sealed cover. Cost proposals will be opened at a scheduled date and time after the technical review has been completed.

**(A3) The price sheet has been updated to include an “Other” table. Bidder must include all expenses in the fee rate. Expenses may be partitioned out with the bidder’s description in the Other table.**

Q4. General Terms and Conditions #7 – What licenses/certifications/permits are you requiring per this statement?

MARSHALL UNIVERSITY GENERAL TERMS AND CONDITIONS

7. REQUIRED DOCUMENTS: All the items checked below must be provided to the University by the Vendor as specified below.

Certificate, permit, registration, or authorization to perform audit

**(A4) Please provide professional licensure, subject matter certification, or other credentials that pertain to the work being requested. The successful bidder must register with the State of WV Purchasing Division.**

Q5. On the first page of the RFP, the Pre-Bid Meeting is slated for 11/16/2020 @ 10:00 AM LPT and the Bids will be open 11/30/2020 @ 3:00 PM LPT. However, on the last page of the RFP it states that submission is due by 11/30/2020 @ 3:00 PM EST. Can you confirm which time zone we should use for the Pre-Bid Meeting and submission times?

**(A5) The pre-bid meeting is scheduled on November 16, 2020 at 10:00 a.m. Eastern Standard Time. Bid Submissions are due by the bid opening date and time, November 30, 2020 at 3:00 p.m. Eastern Standard Time.**

Q6. To help us draft the response in the expected format, would you like to see the response in a Word format or PowerPoint format?

**(A6) Word format**

Q7. Is there a form or a means to inform you of our "Intent to Bid" or are you using page 25 of the RFP to capture this? Lastly is there a deadline for the "Intent to Bid"?

**(A7) Marshall University Purchasing does not require bidders to submit an "intent to bid". Page 25 should be submitted with the Bidder's response to the RFP. The response must be received on or before 3:00 p.m. EST on November 30, 2020.**

PURCHASING CONTINUATION SHEET

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Requisition No.: MUP21PAUDIT

ADDENDA ACKNOWLEDGEMENT

I hereby acknowledge receipt of the following checked addenda and have made the necessary revisions to my proposal, plans, and/or specifications, etc.

Addenda:

No. 1           X          

No. 2           X          

No. 3                           

No. 4                           

No. 5                           

I understand that failure to confirm the receipt of the each Addendum is cause for rejection of bids.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Company

\_\_\_\_\_  
Date