

Request for Qualifications for Independent Audit Services

Rutland Housing Authority
RFP May 13, 2022

RFQ Document

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REQUEST FOR QUALIFICATIONS

**Rutland Housing Authority
Request for qualifications for Independent Audit Services**

The Rutland Housing Authority is now soliciting proposals from qualified, licensed and insured firms to provide independent audit services for FY2022, FY2023, and FY2024.

Proposal Submittal Deadline: FRIDAY, June 3, 2022 at 4:00 p.m.

Section 3, Minority and/or Women-owned businesses are encouraged to respond.

RFQ Contact: Kirsten Hathaway, Director of Finance and Human Resources
(802)775-2926 extension 11

INTRODUCTION

The Rutland Housing Authority (hereinafter, "RHA") is a public entity that was formed to provide federally subsidized housing and housing assistance to low-income families, within the City of Rutland, Vermont. The RHA is headed by a Chief Executive Officer (CEO) and is governed by a five-person Board of Commissioners and is subject to the requirements of Title 24 of the Code of Federal Regulations (hereinafter, "CFR") and the RHA's procurement policy.

Currently, the RHA owns and/or manages: (a) Sheldon Towers consisting of 74 RAD PBV units (b) Templewood Court consisting of 60 RAD PBV units (c) Hickory Street 78 LIHTC units under 3 limited partnerships including 20 RAD PBV units and 8 traditional PBV units (audits not a component of this RFQ), Rutland Area Bridge Housing and 9 Tremont Street consisting of 8 transitional housing units and 2 traditional units (d) 219 Housing Choice vouchers and (e) 89 Section 8 Mainstream vouchers. The RHA also Administers Vermont's innovative Support and Services at Home (SASH) Program throughout Rutland County.

The RHA currently has a staff of 17.

The Housing Authority's FYE is March 31.

Current Contractor: The RHA's previous auditing firm was Marcum LLP, now serving as the Authority's accounting and financial consulting firm. They performed audits for Fiscal Years 2016-2021. No findings were identified during this time. Their initial contract term was three years, extended for three additional years.

Program Status:

Public Housing Status (prior to RAD conversion): High Performer

Section 8 Status: High Performer

RFQ INFORMATION AT A GLANCE (all times are Central)

RHA CONTACT PERSON Director of Finance and Human Resources (DFHR)	Kirsten Hathaway, khathaway@rhavt.org , 802-775-2926 extension 11
PRE-PROPOSAL CONFERENCE	All questions and responses will be considered as addenda to the RFQ and will be shared with all potential Proposers. Please register with khathaway@rhavt.org to receive all addenda.
RFP QUESTIONS DUE	4:00 p.m. on Tuesday, May 24, 2022
HOUSING AUTHORITY RESPONSES TO QUESTIONS	4:00 p.m. on Wednesday, May 25, 2022
HOW TO FULLY RESPOND TO THIS RFQ BY SUBMITTING A PROPOSAL SUBMITTAL	As instructed within Section 3 of the RFQ document, submit 1 original and 3 copies of your "hard copy" proposal to the RHA office at: Rutland Housing Authority 5 Tremont Street Rutland, VT 05701 Electronic submissions will not be accepted.
PROPOSAL SUBMITAL RETURN & DEADLINE	4:00 p.m. on June 3, 2022
ANTICIPATED APPROVAL BY RHA BOARD OF COMMISSIONERS	Monday, June 13, 2022

1.0 RHA'S RESERVATION OF RIGHTS:

The RHA reserves the right:

- to reject any or all proposals, to waive any informality in the RFQ process, or to terminate the RFQ process at any time, if deemed by the RHA to be in its best interest.
- not to award a contract pursuant to this RFQ.
- to terminate a contract awarded pursuant to this RFQ, at any time for its convenience upon 10 days written notice to the successful firm.
- to retain all proposals submitted and not permit withdrawal for a period of 60 days subsequent to the deadline for receiving proposals without the written consent of the RHA Contracting Officer (CO) which is the CEO of the RHA

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- to negotiate the fees proposed by the proposer entity.
- to reject and not consider any proposal that does not meet the requirements of this RFQ, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.

The RHA shall have no obligation to compensate any firm for any costs incurred in responding to this RFP.

2.0 SCOPE OF WORK (SOW) / TECHNICAL SPECIFICATIONS (T/S): The RHA is seeking proposals from qualified, licensed and bonded firms to provide the following detailed services:

General Requirements

Any audit that is performed by award of this RFQ shall be performed in accordance with generally accepted auditing standards and will additionally require compliance testing and a study of internal accounting controls.

The successful firm will be required to certify that each and every audit is performed in accordance with all applicable federal and state laws and regulations, and in accordance with Generally Accepted Accounting Principles (GAAP).

The RHA was last audited for the fiscal year end March 31, 2021. The programs the RHA will require the successful firm to audit for the fiscal years ending March 31, 2022, March 31, 2023 and March 31, 2024, include the following:

- RAD Housing Program (154 units);
- Resident & Supportive Services (ROSS) Grant (ending March 2022);
- Capital Fund Program Grant (ending 2021)
- Support and Services at Home (SASH) Grant
- Housing Choice Voucher Program (219)
- Mainstream Voucher Program (89)

The Housing Authority reserves the right to negotiate the renewal of this contract for three additional one-year periods.

The FY2022 audit will be required to be performed in compliance with the following schedule:

- Field work must be completed by September 30, 2022;
- Draft report must be submitted by October 31, 2022;
- Final report must be submitted by November 11, 2022.
- FDS Audited Submission by November 30, 2022
- Similar deadlines will be established for the work pertaining to ensuing FY's based on HUD requirements as they might change.

Once completed, the successful firm will be required to submit to the RHA a total of 8 copies of the Single Audit Report.

The Auditor's Responsibilities:

General Responsibility: The audit shall be conducted in accordance with GAGAS. The audit shall cover the entire operations of the RHA.

Financial Statements: Determine whether the RHA's financial statements are fairly presented in all material respects in conformity with generally accepted accounting principles (GAAP). Also determine whether the schedule of expenditures of Federal awards is presented fairly in all material respects in relation to the RHA's financial statements taken as a whole.

Internal Control: Perform procedures to obtain an understanding of the RHA's internal control systems.

Compliance: Determine whether the RHA has complied with laws, regulations, and the provisions of contracts or grant agreements that may have a direct and material impact on each of its major programs.

Audit Follow-up: Follow-up on prior audit findings; perform procedures to assess the reasonableness of the summary of schedule of prior audit findings prepared by the RHA.

Data Collection Form: Complete and sign specified sections of the data collection form.

Audit Reporting: The auditor's report shall include:

- An opinion on financial statements and schedule of expenditure of Federal awards;
- A report on Internal Control;
- Report on compliance;
- A schedule of findings and questioned costs.

Audit Working Papers:

- **Retention of Working Papers:** Retain working papers for a minimum of 3 years after the date of issuance of the auditor's report to the RHA.
- **Access to Working Papers:** Audit working papers shall be made available upon request to the cognizant or oversight agency for audit or its designee. Access to working papers includes the right of Federal agencies to obtain copies of working papers, as is reasonable and necessary.

Adherence to standards set forth by generally accepted auditing standards (GAAS) and the generally accepted government auditing standards (GAGAS).

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Prepare the Audit Engagement Letter in accordance with AICPA standards. This letter will be a formal contract between the auditor and the RHA. It confirms the auditor's acceptance of the appointment and documents the agreed-upon scope and terms of the engagement and shall become a part of the ensuing contract between the RHA and the selected auditor. The basic elements of the Audit Engagement Letter shall be:

- Names of the parties to the contract.
- Audit schedule.
- Reporting package and its format.
- Auditor/RHA relationship regarding changes in the kind or amount of work required, and access to and ownership of audit products, including:
 - At any time the RHA may, by written notice, make changes in or additions to work or services within the general scope of the agreement. If such changes are made, an equitable adjustment will be made in the cost of the audit using the rates specified in the agreement.
 - If the auditor believes that a change in or addition to work is beyond the general scope of the agreement, it must notify the RHA in writing within 10 business days of being notified to begin such work. The final administrative authority in settling such disputes shall rest with the RHA.
 - Audit Work Papers: The work papers prepared by the auditor during the audit are its own property. These documents shall be retained for a period of at least 3 years after issuance of the Report.

Submission: The FDS Audited Submission must be submitted online no later than the HUD established deadline.

The objective of the audit is the expression of an opinion on the financial statements.

The Management of the RHA is responsible for the RHA's financial statements.

Management is responsible for establishing and maintaining effective internal control systems.

Management is responsible for identifying and ensuring that the RHA complies with applicable laws and regulations.

Management is responsible for making all financial records and related information available to the auditor.

At the conclusion of the audit, Management will provide the auditor with a letter that confirms certain representations made during the audit (Management Representation Letter).

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The auditor is responsible for conducting the audit in accordance with generally accepted auditing standards (GAAS) and/or generally accepted governmental auditing standards (GAGAS).

The audit includes obtaining an understanding of the RHA's internal controls sufficient to plan the audit and to determine the nature, timing and extent of audit procedures to be performed.

Management is responsible for adjusting the financial statements to correct material misstatements and for affirming to the auditor in the representation letter that the effects of any uncorrected misstatements aggregated by the auditor are immaterial, both individually and in the aggregate.

Arrangements regarding the conduct of the engagement (i.e., timing; client assistance; availability of documents and use of specialists or internal auditors; etc.)

Arrangements involving a predecessor auditor, fees, expense reimbursement and payment schedule.

Any limitation of or other arrangements regarding the liability of the auditor or the RHA.

Any other conditions under which third parties may be granted access to the auditor work papers.

Provision of services relating to regulatory requirements or other non-audit services.

All proposed work shall include any required assistance and verification that the Contractor must provide to assist and ensure the appropriate on-time submission of the audited Financial Data Schedule to HUD.

The HA's Responsibilities:

As defined with Uniform Guidance:

- Provide Federal program-related information: Federal awards received and expended including the Unique Entity Identifier (UEI) title and number; award number and year; name of the Federal agency; and the name of the pass-through entity.
- Maintain internal control over Federal programs that provides reasonable assurance that the HA is managing Federal awards in compliance with laws, regulations and the provisions of contracts or grant agreements that could have a material effect on each of its Federal programs.
- Comply with laws, regulations, and the provisions of contracts or grant agreements related to each of its Federal programs.
- Prepare the appropriate financial statements, including the schedule of expenditure of Federal awards in accordance with Uniform Guidance.

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- Ensure that the required audits were properly performed and submitted in a timely manner.
- Follow up and take corrective action on audit findings, including preparation of a summary schedule of prior audit findings and a corrective action plan in accordance with Uniform Guidance.
- Submit the reporting package to OMB-designated Federal Clearinghouse and to its Cognizant Agency, including the Data Collection Form.

As defined within 24 CFR Part 85.20:

- **Financial Reporting:** Disclose accurate, current and complete financial results of HUD assisted programs.
- **Accounting Records:** Identify the source and application of funds provided for HUD assisted activities.
- **Internal Controls:** Maintain effective controls and accountability for all assets, including accounting controls and management activities.
- **Budget Controls:** Prepare a separate budget for each HUD-assisted program, based on HUD prescribed categories, and assure that expenditures do not exceed the approved budget.
- **Allowable Cost:** Ensure that funds are expended in accordance with program requirements, based on OMB Circular A-87 or as amended.
- **Source Documentation:** Main source documents and files that support the financial transactions recorded in the books, providing an adequate audit trail.

As defined within the Statement on Auditing Standards No. 85:

- **Prepare Management Representation Letter.** This is the RHA's written representations on financial statements under examination by the auditor. In accordance with generally accepted auditing standards (GAAS), the auditor requests this document from the RHA prior to the conclusion of the audit.

As defined within 24 CFR 902.33:

Ensure submission of the audited financial data to HUD's Real Estate Assessment Center (REAC) within 9 months after its fiscal year-end date.

3.0 FY PROPOSAL FORMAT/SUBMISSION REQUIREMENTS:

PROPOSAL DOCUMENT FORMAT REQUIREMENTS

***All proposals submitted in response to this RFQ must be formatted in accordance with the sequence noted in the following table.

***Each category must be separated by numbered index dividers (which number extends so that each tab can be located without opening the proposal) and labeled with the corresponding tab reference also noted below.

*****Proposal Submittal Binding Method:** It is preferable and recommended that the proposer bind the proposal submittals in a three ring binder or comb binder.

PROPOSAL DOCUMENT CONTENTS

TAB 1. Form of Proposal: Submit under this tab.

TAB 2. Form HUD-5369-C (8/93), *Certifications and Representations of Offerors, Non-Construction Contract:* Submit under this tab.

1. **HUD Form 5369-B, Instructions to Offerors, Non-Construction:** Read and Initial each page indicating that you have read and agree with the contents.
2. **HUD Form 5370-C, General Contract Conditions, Non-Construction:** Read and Initial each page indicating that you have read and agree with the contents.

TAB 3. Profile of Firm Form: Submit under this tab.

TAB 4. Proposed Services: Clearly detail within the information submitted under this tab documentation showing:

- As detailed within Section 4, Evaluation Factor No. 2, herein, the proposer's Demonstrated Understanding of the RHA's Requirements.
- As detailed within Section 4, Evaluation Factor No. 3, herein, the proposer's Technical Approach (including, if appropriate, labor categories, estimated hours and skill mix) and the proposer's proposed Work Plan to provide the required services.
- As detailed within Section 4, Evaluation Factor No. 4, herein, the proposer's Technical Capabilities (in terms of personnel, equipment and materials) and Management Plan (including staffing of key positions, method of assigning work and procedures for maintaining level of service, etc.).
- As detailed within Section 4, Evaluation Factor No. 5, herein, the proposer's Demonstrated Experience in performing similar work and the proposer's Demonstrated Successful Past Performance (including meeting costs, schedules and performance requirements) of contract work substantially similar to that required by this solicitation.
 - An explanation and copies of forms that will be used and reports that will be submitted and the method of such reports (i.e. written; fax; internet; etc.);
 - A complete description of the products and services the firms provides.

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TAB 5. Managerial Capacity/Financial Viability: The proposer entity must submit under this tab a concise description of its managerial and financial capacity to deliver the proposed services, including:

- brief professional resumes for the persons identified within areas (5) and (6) of *Profile of Firm Form*
- qualifications to provide the services; a description of the background and current organization of the firm.

TAB 6. Client Information: The proposer shall submit a listing of former or current clients, including the Public Housing Authorities, for whom the proposer has performed similar or like services to those being proposed herein. The listing shall, at a minimum, include:

- The client's name;
- The client's contact name;
- The client's telephone number;
- Services provided and dates

TAB 7. Sample Engagement Letter

TAB 8. Conflicts of Interest: Describe any existing or potential conflicts of interest, involving employees or family members and associates of your firm having a financial stake in your firm's involvement with the Rutland Housing Authority, as it pertains to this proposed project. If no conflicts are expected, please respond with "No conflicts".

TAB 9. Subcontractor/Joint Venture Information (Optional Item): The proposer shall identify hereunder whether or not he/she intends to use any subcontractors for this job,

TAB 10. Other Information (Optional Item): The proposer may include hereunder any other information that the proposer believes is appropriate to assist the RHA in its evaluation.

If no information is to be placed under any of the above noted tabs (especially the "Optional" tabs), please place there under a statement such as "NO INFORMATION IS BEING PLACED UNDER THIS TAB" or "THIS TAB LEFT INTENTIONALLY BLANK." **DO NOT eliminate any of the tabs.**

Submissions which, in the judgement of RHA, fail to meet the requirements of this solicitation or which are in any way conditional, incomplete, obscure, contain additions or deletions from requested information, or contain errors, may be rejected. RHA is under no obligation to select the lowest price package and will award a contract based on the package that best meets our needs at the best value.

PROPOSAL SUBMISSION

Submission Deadline: 4:00 p.m. on June 3, 2022. This applies to both the online Fee Submission and Delivery of Hard-Copy Documents to the HA Office.

Entry of Proposed Fees:

- **DO NOT ENTER THE PROPOSED FEES IN THE BODY OF THE BID PROPOSAL FORM**
- The proposed fees shall be submitted by the proposer and received by the RHA in a sealed envelope as instructed **on the attached form**
- The ensuing total sum will be the firm fixed fee for the proposed work for each fiscal year (FY).
- You must either enter a proposed fee for each item--a "No Proposal" will not be allowed for any item.
- Please note that the proposed fees submitted by each proposer are inclusive of all necessary costs to provide the proposed services, including, but not limited to: employee costs and benefits; clerical support; overhead; profit; supplies; materials; licensing; insurance; travel expense; etc.

Escalation: Pertaining to the ensuing contract, there shall be no escalation of the proposed unit costs allowed at any time during the awarded contract periods other than those entered as a firm-fixed fee for each FY.

Proposal Hard-Copy Delivery: All proposals must be submitted and time-stamped received in the designated RHA office by no later than the submittal deadline stated herein (or within any ensuing addendum).

- A total of **1 original signature copy** (bound) (marked "ORIGINAL") and **3 exact copies** (bound) shall be placed unfolded in a sealed package and addressed to:

Rutland Housing Authority
Attention: Kirsten Hathaway
Director of Finance and HR
5 Tremont Street
Rutland, VT 05701

- **The package exterior** must clearly denote Independent Audit Services RFQ Proposal and must have the proposer's name and return address. Proposals received after the published deadline will not be accepted.

Submission Conditions: DO NOT FOLD OR MAKE ANY ADDITIONAL MARKS, NOTATIONS OR REQUIREMENTS ON THE DOCUMENTS TO BE SUBMITTED! Proposers are not allowed to change any requirements or forms contained herein, either by making or entering onto these documents or the documents submitted any revisions or additions

Submission Responsibilities: It shall be the responsibility of each proposer to be aware of and to abide by all dates, times, conditions, requirements and specifications set forth within all applicable documents issued by the RHA, including the RFQ document, the documents listed within the following Table of Attachments and any addenda and required attachments submitted by the proposer.

Proposer's Responsibilities--Contact with the HA: It is the responsibility of the proposer to address all communication and correspondence pertaining to this RFQ process to the Director of Finance and Human Resources only. Proposers must not

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make inquiry or communicate with any other RHA staff member or official (including members of the Board of Commissioners) pertaining to this RFQ. Failure to abide by this requirement may be cause for the RHA to not consider a proposal submittal received from any proposer who may have not abided by this directive.

Addenda: All questions and requests for information must be addressed in writing to the DFHR. The DFHR will respond to all such inquiries in writing by addendum to all prospective registered proposers. During the RFQ solicitation process, RHA staff will NOT conduct any *ex parte* (a substantive conversation—“substantive” meaning, when decisions pertaining to the RFQ are made—between the RHA and a prospective proposer when other prospective proposers are not present) conversations that may give one prospective proposer an advantage over other prospective proposers.

4.0 PROPOSAL EVALUATION:

Evaluation Factors: The following factors will be utilized by the RHA to evaluate each proposal submittal received; award of points for each listed factor will be based upon the documentation that the proposer submits within his/her proposal:

1	30 points	Objective	The PROPOSED COSTS the proposer proposes to charge the HA to complete the required work.
2	15 points	Subjective (Technical)	The proposer’s DEMONSTRATED UNDERSTANDING of the REQUIREMENT ;
3	20 points	Subjective (Technical)	The APPROPRIATENESS of the TECHNICAL APPROACH (including labor categories, estimated hours and skill mix) and the QUALITY of the WORK PLAN .
4	15 points	Subjective (Technical)	The proposer’s TECHNICAL CAPABILITIES (in terms of personnel, equipment and materials) and the MANAGEMENT PLAN (including staffing of key positions, method of assigning work and procedures for maintaining level of service, etc.).
5	15 points	Subjective (Technical)	The proposer’s DEMONSTRATED EXPERIENCE in performing similar work and the proposer’s DEMONSTRATED SUCCESSFUL PAST PERFORMANCE (including meeting costs, schedules and performance requirements) of contract work substantially similar to that required by this solicitation as verified by reference checks or other means.
6	5 points	Subjective (Technical)	The OVERALL QUALITY AND PROFESSIONAL APPEARANCE OF THE PROPOSAL SUBMITTED , based upon the opinion of the evaluators.
	100 points	100 points	Total Points

Evaluation Method:

- CEO evaluates proposals for responsiveness
- Selection Committee including the Director of Finance and HR evaluates and provides results to the CEO.
- Determination of top-ranked proposer
- If applicable, establish Competitive Range and/or conduct best and final negotiations
- Notify all proposers of the results of the evaluations by email

Note: A Proposer must receive a calculated average of at least 70 points to be considered to receive an award. The award will not necessarily go to the lowest bidder, but to the firm that, in the sole opinion of the RHA, best meets the criteria within this RFQ.

5.0 CONTRACT AWARD:

Engagement Letter:

- The Sample Engagement Letter should be included as an attachment to the proposal

Unauthorized Sub-Contracting Prohibited: The successful proposer shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFQ (including, but not limited to, selling or transferring the contract) without the prior written consent of the CEO.

Contract Period: The RHA anticipates that it will initially award a contract for services pertaining to FY2022-2024 only. The RHA shall retain the right to renegotiate this contract, at the RHA's option, for three additional FY's.

Licensing and Insurance Requirements: Prior to award (but not as a part of the proposal submission) the *successful proposer* will be required to provide:

- An original certificate evidencing the proposer's current worker's compensation insurance carrier and coverage amount;
- An original certificate evidencing General Liability coverage, naming the RHA as an additional insured, together with the appropriate endorsement to said policy reflecting the addition of the RHA as an additional insured under said policy (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000, together with damage to premises and fire damage of \$50,000);
- An original certificate showing the proposer's professional liability and/or "errors and omissions" coverage (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000), with a deductible of not greater than \$1,000;
- If applicable, a copy of the proposer's state license authority allowing the proposer to provide the services detailed herein.
- A copy of the firm's IRS 990 tax form

Right to Negotiate Final Fees: The RHA shall retain the right to negotiate the amount of fees that are paid to the successful proposer, meaning the fees proposed by the top-rated proposer may, at the RHA's options, be the basis for the beginning of negotiations. Such negotiations shall begin after the HA has chosen a top-rated proposer. If such negotiations are not, in the opinion of the CEO successfully concluded within 5 business days, the RHA shall retain the right to end such negotiations and begin negotiations with the next-rated proposer. The RHA shall also

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retain the right to negotiate with and make an award to more than one proposer, as long as such negotiation(s) and/or award(s) are addressed in the above manner (i.e. top-rated first, then next-rated following until a successful negotiation is reached).

Contract Service Standards: All work performed pursuant to this RFQ must conform and comply with all applicable local, state and federal codes, statutes, laws and regulations.

**Rutland Housing Authority
Bid Proposal Form
RFQ Auditing Services**

Instructions: Please complete this BID Proposal Form listing a lump sum fee for each audit period. This will be a firm fixed fee for the proposed work for each fiscal year inclusive of all expenses. This form must be submitted in a sealed envelope marked "RFQ FOR QUALIFICATIONS - RUTLAND HOUSING AUTHORITY."

DO NOT ENTER THE PROPOSTED FEES IN THE BODY OF THE PROPOSAL DOCUMENT

The undersigned, having fully familiarized themselves with all aspects of the RFQ dated May ____, 2022, hereby proposes the Auditing Services as per the Request for Qualifications at the following costs not to exceed:

Annual Lump Sum Fee:

Fiscal Year 04-01-2022: _____

Fiscal Year 04-01-2023: _____

Fiscal Year 04-01-2024: _____

Firm Name: _____

Address: _____

Federal ID# (Must be provided): _____

Signature of Authorized Agent/Title: _____

Print or Type Name: _____ Date: _____

Phone Number: _____ Email: _____

The undersigned hereby designates his business structure and location:

Firm is (check one): Sole Proprietor Partnership Corporation

If the Firm is a Sole Proprietor/Partnership, state the following:

Name(s) of Partners: _____

If the Firm is a Corporation, state the following:

Organized under the laws of the State of: _____

Name(s) and Title(s) of officers authorized to sign the contract:
