

Financial Consultant Services

Request for Proposals

August 28, 2015

Please address all questions and correspondence to:

Michael L. Curtis, CPA, CMA
Salisbury-Rowan Community Action Agency, Inc.
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REQUEST FOR PROPOSALS

The Salisbury-Rowan Community Action Agency, Inc. (the Agency) is requesting proposals from qualified Certified Public Accountant with not for profit experience to provide financial consulting services for its Finance Committee and Board of Directors, and other ancillary services as may be requested and agreed upon.

The consulting service is to provide financial expertise to the Finance Committee and Board of Directors, including attending monthly committee and board meetings.

There is no expressed or implied obligation for the Agency to reimburse firms for any expenses incurred in preparing proposals in response to this request.

The Agency reserves the right to reject any or all proposals submitted.

During the evaluation process, the Agency reserves the right to request additional information or clarifications from proposers, or to allow corrections of errors or omissions. At the discretion of the Agency, firms submitting proposals may be requested to make oral presentations as part of the evaluation process.

Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the Agency and the firm selected.

It is anticipated that the selection of a firm will be completed no later than October 31, 2015. Following the notification of the selected firm, it is expected that an engagement letter will be executed and field work scheduled within 30 days of approval.

Contract Period - The agreement shall be for a one-year period and shall become effective immediately upon execution by all parties with implementation of all specified services to take place starting no later than the November 2015 Finance Committee and/or Board of Directors meeting. The contract entered into between the Agency and the firm may be extended by mutual agreement.

Compensation -- Proposals shall include a good-faith estimate of costs, including fixed hourly rates for consultant personnel. Upon request the firm will provide the Agency with a statement of chargeable hours to substantiate billings.

Proposal Evaluation -- Proposals will be evaluated based on factors including but not limited to estimated total cost and/or hourly rates, experience working with similar nonprofits, experience working with agencies funded by Head Start, Child and Audit Care Food Program (CACFP), Weatherization Assistance Program (WAP), Community Services Block Grant (CSBG) and Workforce Innovation Opportunity Act (WIOA) and verification of references.

Contact--The consultant's principal contact with the Agency will be Michael L. Curtis, CPA, CMA, Finance Director, who will coordinate the assistance to be provided by the Agency to the consultant

Background Information--The Agency is a 501(c)(3) non-profit providing high quality early childhood education to children, family development services, youth career & education training services and weatherization of homes to improve energy efficiency.

The Agency receives approximately 79% of its funding through the DHHS Head Start/Early Head Start grant, with remaining funding coming from CSBG, WIOA and WAP programs.

The Agency's complexity can best be described as mid to high, with multiple funding streams, and twenty-two Head Start/Early Head Start Centers located in five counties and a Central Office in Salisbury, NC.

Submission of Proposals

To be considered, a proposal must be received by the Agency by the end of the day, Friday, September 18, 2015. Proposals should be sent to the attention of the Finance Director: Michael L. Curtis, CPA, CMA. Either hard-copy or email proposals will be accepted.