



Town of East Greenwich Financial Analysis Request for Qualification

Summary

The Town of East Greenwich hereinafter called “the Town” seeks competitive services of a qualified consultant to support its specific initiatives. The Town of East Greenwich seeks a consultant that is a certified School Business Manager Consultant to assist in creating, facilitating, and analyzing a financial review of the East Greenwich School District’s finances. The consultant must be a Certified Public Accountant and have had experience in municipal receiverships. The work must be completed by May 15, 2017.

The work to be performed will include a review of the financial and accounting operations currently in place at the East Greenwich School District for the East Greenwich Town Council.

A copy of this Request for Qualification (RFQ) may be obtained from the Town’s web site at <http://www.eastgreenwichri.com>. It is the sole responsibility of the ‘proposer’ to monitor the Town’s web site for any amendments to the RFQ. For the purpose of this document the terms proposer, vendor and contractor are those entities representing the submission of a response to this RFQ.

Evaluation

The evaluators will consider how well the consultant’s proposal meets the needs of the Town as described in the consultant’s response. The evaluation process is not designed to simply award the contract to the lowest cost agency. Rather, it is intended to help the Town select the right consultant with the best combination of professional attributes, experience, certifications and relevant skill-sets, including that of price, based on the evaluation factors.

At the completion of the RFQ process, the Town of East Greenwich will complete contract negotiations with the chosen vendor to provide services, representing, but not limited to, the proposal that best meets the Town’s criteria in cost, consultant requirements and references.

Background

During the current Fiscal Year 2018 budget preparation, the School Committee stated they are running a significant deficit and has agreed to ask the Town for assistance in hiring an outside Financial Consultant to assist with their finances. The consultant’s overall objective is to provide the Town Council and School District with an understanding of the District’s financial status that will improve the efficiency and effectiveness of the District’s management and operations. The Town Council and the School District are committed to collaborate together on providing the best services to our residents.



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Scope of Work

The scope of work will include the following:

- Confirm the current financial position of the District (deficit) and make recommendations for immediate and long term improvements
- Evaluate the current accounting and financial functions of the District
- Perform a comprehensive cost review to ensure funds are being spent in the most efficient and effective manner possible (expenditures and revenues)
- Identify and review key financial metrics

Response Requirements (minimum requirements)

1. Company profile

- a. Name of the business, contact person, and contact information: Provide address, telephone, mobile telephone number, fax number, e-mail address, and web address, as applicable.
- b. List of subcontractors; if applicable, provide company name, contact person, address, and telephone number, and intended percentage of work to be performed by any subcontractor.

2. Qualifications

- a. Provide a brief description of your firm including: its founding and history, number of employees, service areas, and awards or other forms of recognition.
- b. Provide a description of your work process.

3. Experience and ability to perform this work

- a. Describe the approach your firm would undertake to successfully complete the tasks described in the Scope of Work.
- b. Provide a minimum of three (3) client references.
- c. Provide a list of personnel who would be assigned to the Town of East Greenwich project, along with their credentials and experience.



Town of East Greenwich
Financial Analysis Request for Qualification

4. Pricing and Timeline

- a. Provide a schedule of fees and estimated time duration for each task for all relevant services described in the Scope of Work.

Task	Estimated Hours	Per Hour	Total
Confirm the current financial position of the District (deficit) and make recommendations for immediate and long term improvements.			
Evaluate the current accounting and financial functions of the District.			
Perform a comprehensive cost review to ensure funds are being spent in the most efficient and effective manner possible (expenditures and revenues)			
Identify and review key financial metrics			

- b. The Town is expecting to begin work on this project as soon as the award is made.

Individual questions regarding this RFQ will be responded to only as follows: Questions regarding requirements and scope of work will be accepted up to April 12, 2017 via email only to the Town Manager, Thomas E. Coyle, III at tcoyle@eastgreenwichri.com. Answers to all questions received by this deadline will be sent via email. Telephone calls, faxes and/or requests for a solicitation will not be accepted or acknowledged.

Award

The Town of East Greenwich reserves the right to alter the timing of the start of any work described above or to not proceed with some or all of the work described within this RFQ.

Protocols for Preparing and Delivering Responses to this RFQ;

- Responses to this RFQ must be delivered electronically to the Town of East Greenwich by **3:00pm EST on April 14, 2017**.
- Responses submitted after 3:00 pm EST will not be accepted.
- Responses must be submitted electronically via email to: tcoyle@eastgreenwichri.com with **“RFQ Submission for Accounting and Financial Services”** in the subject line.
- Submissions should consist of one (1) PDF document containing all of the requested information in the same order as the numbered Response Requirements listed above.