

Sample Request for Proposals to Provide Management, Accounting and Other Professional Support Services

REQUEST FOR PROPOSALS

_____[Name]____ (hereinafter the "Program Sponsor") is soliciting proposals to provide the management, accounting and other professional services that these specifications outline and describe.

Proposals will be received until the hour of _____[Time]_____ on _____[Date]_____ in _____[Room]_____ at _____[Street Address]_____.

The Program Sponsor will not consider proposals that arrive after the deadline. Late proposals will be returned unopened. To have their proposals considered, proposers must also follow the instructions and the general terms and conditions included in these specifications. Proposers should direct technical questions to _____[Name]_____ at _____[Telephone Number]_____.

Section 1 -- Overview

1.1 Project Overview

The Program Sponsor hopes to increase the size and number of emerging business enterprises in all sectors of the construction industry. The closely related objectives of its mentor-protégé program are two. The first is to increase the volume of work that emerging business enterprises are winning in open competition with all other firms. The second is to broaden the base of their activity -- increasing the number and stability of such firms, and spreading their activity throughout the building, highway, heavy, industrial and utility sectors of the industry.

To these ends, the Program Sponsor seeks to contract with one or more accounting and other firms to provide management, technical and other professional services to the emerging business enterprises enrolled in the mentor-protégé program.

Section 4 (Scope of Services) outlines the types of services that the mentor-protégé program will require. The Program Sponsor has put these services into several different categories or modules, and proposers are free to address any one or combination of these modules. The Program Sponsor intends to contract with one or more service providers for the various services that Section 4 describes.

The Program Sponsor does not guarantee that the successful proposer(s) will be engaged to provide any particular amount or level of service. The demand for any and all services will depend on the particular needs of the _____[number]_____ firms enrolled in the mentor-protégé program.

A pre-proposal conference will be held at _____[Time]_____ on _____[Date]_____ in _____[Room]_____ at _____[Street Address]_____ .

1.2 Proposal Evaluation and Contract Award

An evaluation committee appointed by the Program Sponsor will evaluate all responsive proposals. This committee will follow and apply with the criteria found in Section 3 (Evaluation of Proposals). Only the highest ranking proposers will be invited to participate in the interview stage of the evaluation process.

1.3 Background & Statistics

The Program Sponsor is _____[General Description]_____

A study of the size and number of emerging business enterprises in the local construction industry reveals _____[General Description]_____

Past studies of the construction industry have identified five major impediments to the success of emerging business enterprises. These impediments are (1) ineffective working relationships, (2) lack of adequate job notification, (3) size of available projects, (4) financing and (5) bonding. The services that Section 4 outlines are all services that the Program Sponsor has found that emerging business enterprises need to address these impediments.

Section 2 -- General Requirements

2.1 Request for Proposals (RFP)

The Program Sponsor requests proposals for management, accounting and other professional support services for emerging business enterprises seeking to enter the mainstream of the construction industry. This request for proposals (RFP) sets forth the minimum qualifications that proposers shall possess and the minimum requirements that their proposals shall meet. The Program Sponsor will not consider proposers that fail to demonstrate the minimum qualifications, or proposals that fail to meet the minimum requirements.

All technical questions and all related communications, including questions about the scope of the work, should be directed to _____[Name]_____ at _____[Telephone Number]_____. All other questions and communications, including questions about the decision-making process, should be directed to _____[Name]_____ at _____[Telephone Number]_____.

2.2 Changes to the RFP

The Program Sponsor reserves the right to modify, revise or cancel this RFP. Neither its receipt of proposals nor its interviewing of proposers shall obligate the Program Sponsor to award a contract.

All modifications and revisions of this RFP shall be made by written addendum signed by _____[Name]_____. All explanations, clarifications and approvals shall be made the same way. The Program Sponsor shall not be responsible for any explanation, clarification or approval made or given in any other manner.

Copies of all addenda will be mailed to each person who requests and receives this document, and such addenda shall be considered a part hereof.

2.3 Proposal Format and Content

Proposals shall be clear and concise and shall address all of the questions that this RFP raises. The Program Sponsor shall not be liable

- In a separate envelope marked "Proposed Fee Schedule," the rate and/or fee schedule for the services proposer would provide. The document shall also state the hourly rates of the individuals who would be assigned to perform the discrete tasks that the proposal includes. The document shall also describe the billing procedures that the proposer would follow.

2.4 Submission of Proposals

Proposers must hand deliver or mail a cover letter and one original and Number copies of their proposals to ____ [Room] ____ at ____ [Street Address] ____ no later than ____ [Time] ____ a 0o dom,,s m68

The successful proposer(s) shall be responsible for providing management, technical and other professional services to the firms enrolled in the mentor-protégé program, and for teaching these firms how to make permanent improvements in their business practices. The services provided to a given protégé, at a given time, will depend on the results of the monthly and other meetings between that protégé and its two mentors. Following is a detailed description of the services that the Program Sponsor seeks to arrange, including the categories or modules into which these services fit.

4.2 One-on-One Support Services

The Consultant shall provide one-on-one support services to protégé firms. The objective in providing one-on-one support services is to transfer knowledge to protégé firms which will enhance their profitability. The Program Sponsor will conduct random quality audits by contacting protégé firms to evaluate the services provided. The key categories or modules are these:

General Business Management:

- Business plan
- Implementation and action plans
- Organization structure/ownership
- Market analysis, marketing/sales
- Operations' assessment (production/administration)

Financial Administration:

- Accounting records preparation and maintenance

4.4 Reporting Requirements

The successful proposer(s) shall maintain project data and submit project activity reports along with its (their) monthly invoices, and on a quarterly and annual basis.

4.5 Monthly Invoice Reporting

The successful proposer(s) shall submit the following information along with its (