

**THE SCHOOL DISTRICT OF PITTSBURGH
(Pittsburgh, PA)**

**REQUEST FOR PROPOSALS
FOR TEMPORARY FINANCE AND BUSINESS
SERVICES**

**Issuance Date: May 18, 2021
Submission Date: June 1, 2021**

Introduction

The purpose of this Request for Proposals (“RFP”) is to solicit proposals for finance and business temporary services to the School District of Pittsburgh. The District’s use of finance and business temporaries is strictly on an as-needed basis and only within budgeted parameters.

The School District envisions a one-year engagement, with an option to renew for an additional period not to exceed two years.

Timetable/Response Submittal

The School District is requesting proposals from experienced and qualified firm(s) to serve as the finance and business temporary agency to the School District. Selection of the firm will be made based on the proposals submitted and possibly oral interviews, if needed. A tentative timetable for the selection process is provided below:

- May 18, 2021 Release of RFP
- June 1, 2021 Receipt of Proposals
- June 23, 2021 Legislative Approval by Board of School Directors

Upon the release of this RFP and during the conclusion of the selection process, there shall be no communication between any prospective respondents and/or their lobbyist(s), agent(s) with any staff of the School District, or any elected representatives or other appointed official of the School District and/or their staff, except as provided for in the RFP. Any violation of this provision by any prospective firm and/or its agent shall be grounds for immediate disqualification.

All proposals for temporary finance and business services agency shall be submitted to the School District as follows:

Ronald J. Joseph Chief Financial Officer School District of Pittsburgh 341 South Bellefield Avenue Pittsburgh, PA 15213 Tel: (412) 529-3777

One (1) original and four (4) copies of the proposal shall be prepared and submitted to the School District in such form as is set forth in this RFP by 12:00 p.m. on Tuesday, June 1, 2021.

Proposals, including any/all attachments, cover letter and tabs should not exceed twenty five (25) pages in length on 8 ½" X 11" paper, single spaced using a minimum font size of 10 pt.

Proposals should be submitted in accordance with the instructions detailed below. The School District reserves the right to select a proposal in its entirety or some portion(s) thereof.

Furthermore, the School District reserves the right to reject any and all proposals and to waive irregularities.

Proposals which are submitted in electronic format or faxed will not be accepted.

Any questions regarding this RFP should be addressed to Mr. Joseph.

Specific Response Requirements

Responses should address the following questions or requests for information and be organized so that the specific questions or requests for information each begin on a new page with the question repeated at the top of the page.

I. Letter of Transmittal

Each proposal should be accompanied by a letter of transmittal which summarizes key points of the proposal and which is signed by an authorized officer.

II. Firm Experience and Qualifications

- A. Please provide an overview of the firm and its qualifications. Please include the location of the firm's office(s) in the Commonwealth of Pennsylvania.
- B. Describe the firm's experience in placing temporary finance and business professionals for the past 2 years for the following categories:
 - 1. All Pennsylvania school districts;
 - 2. All State, Federal and local government units.
 - 3. All others.

III. Finance and Business Temporary Services Team

Provide brief resumes for the following individuals who will be assigned to the School District's account, including any relevant experience for each individual. Please include only those individuals who will work on the School District's account.

- A. The senior advisor who will assume the day-to-day responsibility for managing and supporting the School District's temporary placement needs.
- B. Other members of your team assigned to the project and the specific role that each can be expected to play.

IV. Plan of Work

Please provide a detailed plan of work for the School District's engagement. It should include a fee structure that your firm would propose to provide finance and business temporary services for various departments within the School District. The fee proposal should outline the range of possible job categories that your firm can fill, including a definition of each (e.g. "staff accountant") and an hourly price range for each category.

V. Firm Information/Equal Employment Opportunity

- A. Describe your firm's equal employment opportunity policies and programs.
- B. Has your firm or any of its employees, or anyone acting on its behalf, ever been convicted of any crime or offense arising directly or indirectly from the conduct of your firm's business or have any of your firm's officers, directors or persons exercising substantial policy discretion ever been convicted of any crime or offense involving financial misconduct or fraud? If so, please describe any such convictions and surrounding circumstances in detail.
- C. Has your firm, or any of its employees, or anyone acting on its behalf, been indicted or otherwise charged in connection with any criminal matter arising directly or indirectly from the conduct of your firm's business which is still pending or have any of your firm's officers, directors or persons exercising substantial policy discretion been indicted or otherwise charged in connection with any criminal matter involving financial misconduct or fraud which is still pending? If so, please describe any such indictments and surrounding circumstances in detail.
- D. Please describe (i) any material financial relationships that your firm or any firm employee has with any financial advisory firms, insurance companies, investment banks or law firms or other persons or entities that may create a conflict of interest; (ii) any family relationship that any employee of your firm has with any public servant that may create a conflict of interest, or the appearance of a conflict of interest and (iii) any other matter that your firm believes may create a conflict of interest or the appearance of a conflict of interest in acting as an independent consultant to the School District. Please describe any procedures your firm either has adopted, or would adopt, to assure the School District that a conflict of interest would not exist for your firm in the future.

Evaluation Criteria and Selection Process

The contract(s) will be awarded to the qualified proposer whose proposal is most advantageous to the School District, based upon the evaluation criteria specified below. Thus, while the points in the evaluation criteria indicate their relative importance, the total scores will not necessarily be determinative of award. Rather, the total scores will guide the School District in making an intelligent award decision based upon the evaluation criteria.

The School District reserves the right to request oral presentations from those firms determined to be in a competitive range and shall use the information derived from these oral presentations, if any, in its evaluation.

The School District anticipates selecting one accounting temporary agency using the following criteria to determine which firm meets the needs of the School District best.

<u>Finance and Business Temporary Agency</u>	<u>Points</u>
Ability to Meet the Specific Needs of the School District of Pittsburgh	30
Experience and Qualifications	30
Plan of Work (Including fee structure)	40