



BEST, Inc.

Business Employment Skills Team
Serving Northwest Central Illinois
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May 23, 2018

To Whom It May Concern:

Business Employment Skills Team, Inc. (BEST, Inc.) is a 501(c)(3) not-for-profit organization that administers federal Workforce Innovation and Opportunity Act (WIOA) of 2014 programs and services for an eight-county area that includes Bureau, Carroll, Jo Daviess, LaSalle, Lee, Ogle, Putnam and Whiteside. BEST, Inc. is soliciting quotes for a review of the agency's fiscal unit workflow to determine efficiency within the department.

PROJECT SCOPE AND APPROACH

Learn about the current accounting processes, identify any key issues currently surrounding the process, and understand the roles and responsibilities of personnel involved. Formulate recommendations for streamlining the current processes and the improved use of technology. Based on recommendations, the management team and Board of Directors will decide how to proceed.

We request the following tasks:

- Review existing documentation such as the accounting policies and procedures, organization charts and any other documents as deemed necessary.
- Meet with management and staff to review the goals and objectives of the project and understand who is responsible for what tasks, as well as each individual's specific responsibilities.
- Observe work processes, review documents and the use of technology, and, conduct individual interviews with key staff to understand roles, responsibilities, and opportunities for improvement.
- During the interviews, discuss anticipated future needs and challenges to ensure they are included in recommendations.
- Develop recommendations for priorities and next steps to determine if improvements can be made to our current accounting processes.
- Meet with management at the end of the engagement to discuss observations and recommendations, and issue a final report within three (3) weeks of the visit. If requested, meet with the Board of Directors to discuss observations and recommendations.

POTENTIAL DELIVERABLES

- Recommendations and observations on capacity, structure, and roles and responsibilities of the fiscal department.
- Recommendations to improve the use of accounting technology.
- Recommendations for more effective internal control procedures and activities.
- Recommendations for streamlined fiscal processes.

SUBMITTAL REQUIREMENTS

All proposals must conform to the requirements of this Request for Quote (RFQ). All proposals must provide all information requested. Incomplete information and insufficient signatures and documentation may result in disqualification of the proposal.

Authorized personnel of the bidder must sign the proposal. Proposals may be mailed to the address listed below or submitted electronically to pam_furlan@best-inc.org prior to 3:00 p.m. on June 12, 2018.

Business Employment Skills Team, Inc.
815 N. Orlando Smith Avenue, Room C328
Oglesby, IL 61348
(815) 224-0375 Fax (815) 223-1385

REVIEW CRITERIA/EVALUATION PROCESS

The proposals will be reviewed using the following criteria:

A. Experience of the agency and key staff. (30 points)

Describe your agency's experience in completing similar projects. Identify the key staff who will be involved in this project and describe in detail the relevant experience of each. Provide three references from recent engagements.

B. Responsibilities and Expectations. (30 points)

Describe in detail how each of the tasks identified in this RFQ will be completed.

C. Deliverables. (30 points)

Describe in detail how each of the deliverables will be successfully

achieved. Include the factors that were considered in formulating your recommendations.

D. Cost and Timeline. (10 points)

Detail the cost and expense structure as it will be applied to the services in this Request for Quote (RFQ). This may be done in the form of hourly rate with estimated number of hours, travel costs, or other costs deemed necessary. Include a detailed timeline for completion of this review. Bidders are encouraged to submit their best offer for providing the services solicited and to thoroughly describe and justify the costs. The cost for the total project may not exceed \$8,000.

PROPOSAL CONDITIONS

A. Disclosure of Proposal Content

All proposals will be placed in the public domain and be open to inspection by interested parties. Trade secrets or proprietary information that are recognized as such and protected by law may be withheld, if clearly identified as such in the proposal.

B. Proposal Obligations

The contents of the proposal and any clarifications thereto submitted by the successful bidder shall become part of the contractual obligation and incorporated by reference into the ensuing contract.

C. Disposition of Proposals

Proposals become the property of BEST, Inc. and will not be returned to the bidder.

D. Illinois Statutes and Rules

The terms and conditions of the RFQ and the resulting contract or activities based upon the RFQ shall be construed in accordance with the laws of Illinois. Where statutes and regulations of the United States Government are referenced herein, they shall apply to this RFQ and the resulting contract. Whenever differences exist between federal and state statutes or regulations affecting this procurement, interpretation shall be in the direction of that which is most beneficial to the interests of LWIA
4.

E. RFQ Process Limitation

This request for quotes does not commit BEST, Inc. to award a contract, to pay costs incurred in the preparation of a proposal to this request, or to procure a contract for services. BEST, Inc. reserves the right to accept or reject any and all quotes received as a result of this request, to negotiate with all qualified sources or to cancel this RFQ in part or in its entirety.

The contracting officers may require the bidder(s) selected to participate in negotiations and to submit any budget, technical or other revision of their proposal as deemed necessary.

F. Conflicts Between Terms

BEST, Inc. reserves the right to accept or reject any exception taken by the bidder to the terms and conditions of this request for quote.

G. The Resulting Contract

The contract shall be a combination of the specification, terms and conditions of this RFQ, the offer contained in the bidder's proposal and any written clarifications or changes made in accordance with the provisions herein.

Questions concerning this Request for Quote may be addressed to the undersigned at BEST, Inc. at 815 N. Orlando Smith Avenue, Room C328, Oglesby, IL 61348.

Sincerely,

A handwritten signature in cursive script that reads "Pam Furlan".

Pam Furlan, Executive Director
BEST, Inc.