



Urban League of
Greater Oklahoma City

*Empowering Communities.
Changing Lives.*

**Request for Qualifications for
Accounting Services related to the
OKC Minority Supplier Diversity Program**

RFQ Date of Release: August 7, 2023

First Review of Proposals Responses: August 21, 2023

Deadline for Proposals Responses: July 30, 2024

Proposal responses will be accepted on an ongoing basis upon release of this RFQ and up to the deadline for responses.

Responses and/or questions may be submitted via email at snealy@urbanleagueok.org

Urban League of Greater Oklahoma City, Inc.
3900 N. Martin Luther King, Ave.
Oklahoma City, OK 73111

I. PURPOSE OF THE RFQ

As part of the Oklahoma City Minority Supplier Diversity Program, the Urban League, in network with REI Oklahoma and the Greater Oklahoma City Hispanic Chamber of Commerce, is working to assist Oklahoma City minority owned businesses who are recovering and growing from the effects of COVID-19. Eligible businesses will receive assistance in becoming applicants for local, state and federal contracts. The long-term goal of the Minority Supplier Diversity Program is to have a wide network of minority-owned businesses in OKC that are able to meet the requirements of larger contracts. Applicants will receive services to help apply for business certifications, loans, bonding and to prepare financial statements to respond to RFPs and obtain pre-qualification with the government entities like The City of Oklahoma City and State of Oklahoma.

II. CONSULTANT SERVICES DESIRED

As part of the OKC Minority Supplier Diversity Program, eligible businesses may receive accounting services. The service will teach eligible businesses how to prepare financial records for submission of bidding documents and prequalification processes. The intent is not to provide general accounting services required by businesses for normal operations (e.g., filing taxes or producing monthly earning statements).

Consultants will provide accounting assistance services to eligible businesses exclusively for the following purposes:

- To obtain prequalification status with The City of Oklahoma City's Public Works Department (See Prequalification Assistance);
- To prepare and submit competitive responses for Bid Opportunities (See Bid Assistance);
- To secure bonding or loan products to compete for, obtain, and execute competitive procurement opportunities.

Accounting assistance services will be performed by CPAs licensed in the State of Oklahoma and who have a thorough understanding of accounting principles, procedures and practices including, but not limited to GAAP and production of financial statements.

Consultant will be well versed in The City of Oklahoma City Public Works prequalification requirements to ensure financial and accounting statements meet the minimum requirements for successful prequalification. For those submitting to other RFPs, consultants will review financial expectations and requirements provided in the RFP to ensure alignment.

Prequalification criteria required by the City of Oklahoma City Public Works department includes:

- A. Contractors with any Class A or B prequalification, in any category of work, must submit:

- a. Full set of Financial Statements which have been reviewed or audited by a Certified Public Accountant (CPA) within the last 6 months, however, if
- b. The full set of Financial Statements, reviewed or audited by a CPA, are more than six (6) months but less than one (1) year old then must also be accompanied by the Contractor's certificate attesting to the accuracy of the information in Financial Statement and there has not been substantive change to the financial status to the Contractor.

B. Contractors with any Class C prequalification, in any categories of work, must submit:

- a. Full set of Financial Statements but are not required to have the Financial Statement to be independently reviewed or audited. The Contractor's certificate attesting to the accuracy of the information in the Financial Statement must be submitted.
- b. All financial statements must be accompanied by a Letter of Assurance indicating the total amount of bonds that they are willing to execute on your behalf and provide a copy of their Power of Attorney.

C. Contractors with any Class D prequalification, in any category of work, Contractors are not required to submit Financial Statements.

Our intent is to select a pool of qualified professionals to provide this technical assistance based on the needs of eligible businesses needing assistance. Individual consulting assignments may be limited in scope in order to provide assistance to as many small businesses as possible. For each assignment, consultants will enter into an agreement with Urban League to provide an approved scope of services and will be paid directly by Urban League. Consultants responding to this RFQ may propose to provide one or more of the services listed above and/or other related services.

III. RFQ SUBMITTAL REQUIREMENTS

Statement of Professional Credentials and Qualifications - List all professional services you feel you or your firm are qualified to perform. Include a list of all professionals in your firm, their qualifications and copies of professional licenses, as applicable.

Website – Provide a link to your website. If you do not have a web presence, we will not be able to include you in our roster of approved consultants.

Elevator Pitch – Provide us with three sentences about the type of work you do and what you help your clients achieve. This, along with the website, will be presented to potential clients to help them determine who to work with.

Representative Work – Present a summary and/or examples of at least three (3) projects completed by the team that are relevant to your expertise.

Fees – Present a fee schedule for services proposed. Discuss how hourly meetings and reimbursables will be billed.

Evidence of Professional and Business Licenses and Insurances for Professional Liability (sometimes called Errors & Omissions), Workers Compensation, and General Liability, and Auto.

Supplier Diversity Certifications (if applicable) – Documentation from the State of Oklahoma if your company is an MBE or WBE.

Past Program Experience – Present past experience working with Urban League, REI Oklahoma or the Greater Oklahoma City Hispanic Chamber of Commerce, or similar types of non-profit entities.

W9 form – Please provide a completed W9 form.

REVIEW OF RFQ SUBMISSIONS: CRITERIA AND TIMELINE

After receipt of proposals, the submissions will be reviewed for completeness by Urban League staff. The next phase of the selection process will consist of review and evaluation of the proposals based upon, but not limited to, the following criteria:

- Review of consultant and/or team qualifications and their demonstrated expertise in completing assignments similar to the needs of the program;
- Ability to provide insurance coverages requested;

Professional reference checks;

- Prior experience;
- Competitiveness of proposed fee schedule;
- Completeness of the RFQ submission.

TIMELINE FOR REVIEW

RFQ Release: August 7, 2023

First Review and Acceptance of Proposals: August 21, 2023

Deadline for Proposal Responses: July 30, 2024

Proposal responses will be accepted on an ongoing basis upon release of this RFQ and up to the deadline for responses.

RIGHT TO REJECT

Urban League reserves the unconditional right, at their sole discretion, to reject any or all proposals submitted for any reason or no reason. They may, at their discretion, waive any informalities, minor

defects, or technical inaccuracies in the proposals. They reserve the right to request and obtain any additional information necessary to complete evaluation of the proposals.

Title VI of the Civil Rights Act of 1964. Under Title VI of the Civil Rights Act of 1964, no person shall, on the grounds of race, color, creed, religion, sex or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance.

Anti-Lobbying. Consultant agrees that it or any agent or agency thereof, will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. § 1352.

Conflicts of Interest. Consultant and no other officer, employee, or agent of Consultant who exercises any functions or responsibilities in connection with the planning or carrying out of the Scope of Work, shall have any personal financial interest, direct, or indirect, in this Agreement. Consultant shall take appropriate steps to assure compliance with this Section.

Responses may be submitted via email at snealy@urbanleagueok.org.