

All responses should be submitted in writing to:

Sherri Ziller, Chief Operating Officer
Northwest Indiana Regional Development Authority
9800 Connecticut Drive
Crown Point, IN 46307

and be clearly marked "**RDA Accounting Services**". Please submit 5 hard copies of the proposal.

Additionally, please send an electronic copy of the qualification packet as a PDF file to sziller@rda.in.gov

Review and Evaluation

The Fiscal Task Force will review and evaluate the qualifications based on, but not necessarily limited to, the completeness and clarity of the packet submitted, past experience in similar engagements by firms and their staff members assigned to this account, qualifications and availability of key personnel to participate in service delivery, and the fees involved in this submittal.

Your Response to This Request for Proposal

In responding to this request, we request the following information:

1. Detail your firm's experience in providing accounting services to entities in the governmental not-for-profit sector of a comparable size to the Northwest Indiana Regional Development Authority.
2. Discuss your firm's independence with any potential conflicts of interests with respect to the Northwest Indiana Regional Development Authority.
3. Discuss commitments you will make to staff continuity, including your staff turnover experience in the last three years.
4. Identify the five largest clients your firm (or office) has lost in the past three years and the reasons. Also, discuss, in instances where loss of the client was due to an unresolved auditing or accounting matter, the process of attempting to resolve the issue(s).
5. Identify the partner, manager, and in-charge accountant who will be assigned to the RDA if you are successful in your bid, and provide biographies. Indicate any complaints against them that have been leveled by the state board of accountancy or other regulatory authority, if any. Indicate any corrective actions that have been taken by the firm with respect to these people.
6. Discuss the firm's use of technology. Also, discuss the communication process used by the firm to discuss issues with management staff and the Northwest Indiana Regional Development Authority
7. Set forth your fee proposal for the services offered, with whatever guarantees can be given regarding increases in future years. Provide your proposed fee for the required accounting services, tax document preparation, quarterly review work, and preparation of monthly and quarterly reports.
8. Furnish standard billing rates for classes of professional personnel for each of the last two years.
9. Provide the names and contact information for other, similarly sized clients of the partner and manager that will be assigned to the Northwest Indiana Regional Development Authority for reference purposes.
10. Describe how and why your firm is different from other firms being considered, and why our selection of your firm as our independent accountants is the best decision we could make.

11. Include a copy of your firm's most recent peer review report, the related letter of comments, and the firm's response to the letter of comments.
12. Attach a copy of the Ethics Policy to which the applicants adheres.
13. Describe your firm's presence, activities and engagements in our northwest Indiana community.
14. Supply the RDA with a current list of clients served by the applicant's firm.
15. Submit your firm's plan for using WBEs and MBEs where possible in fulfilling this contract.

Evaluation Criteria

The proposal will be evaluated based upon the following two areas. Therefore, it is important that your proposal be responsive to the data requested.

1. **Cost**

Overall cost, including out-of-pocket expenses, for performing accounting functions.

2. **Qualifications**

- a. Organizational structure and size of the firm.
- b. Recent experience performing similar accounting functions.
- c. Qualifications of the accounting team.
- d. Individuals with whom the accounting team can consult, internal to your firm

Terms and Conditions

- a. The RDA reserves the right to reject all proposals, and to waive minor irregularities in any proposal.
- b. The RDA reserves the right to request clarification of information submitted, and to request additional information from any respondent.
- c. The RDA reserves the right to award a contract to the next most qualified firm, if the first chosen firm does not execute a contract by the proposed implementation date.
- d. The RDA reserves the right to reject any proposed agreement or contract that does not conform to the specifications contained in this RFP.
- e. The RDA shall not be responsible for any costs incurred by the respondent in preparing, submitting, or presenting its response to the RFP.