



Shared Services Request for Proposal

Muskegon Oceana Community Action Partnership (MOCAP), is accepting proposals for an interim Executive Director and accounting services. MOCAP is interested in sharing an Executive Director and an accounting team with another Community Action Agency (CAA) in Michigan. MOCAP anticipates a shared services agreement for 60-90 days with the option for renewal.

MOCAP is a private non-profit organization located in Muskegon, Michigan with an annual operating budget of one million. For background, see previous years' audits, budgets and financial reports attached to this RFP.

MOCAP is a nonprofit that receives mostly federal and state funding. Bidders should be highly experienced in applying rules promulgated in the OMB Super Circular, the Michigan Department of Health and Human Services, the Michigan Department of Education, the Michigan State Housing Development Authority and the US Department of Housing and Urban Development (HUD). Accounting services should be aligned with the requirements for an A-133 audit.

MOCAP currently performs accounting in house using Abilia (MIP).

Interested CAAs should send a **letter of interest by June 2, 2017** to Kiesha Guy at Kiesha@Mocapi.org or by mail to:

Shared Services Search Committee
Muskegon Oceana Community Action Partnership
1170 W. Southern Avenue
Muskegon, MI 49441

Proposals for Shared Services will be **due June 9**; oral presentations would be made to the selection committee on June 14 in Muskegon.

Key responsibilities of the Interim Executive Director would include:

- Advise the Board of Directors regarding all financial, programmatic, and management challenges; develop and maintain solid financial operations; work with the board

finance committee and staff in budgeting; responsible for day to day agency operations and supervision of staff; maintain effective working relationships with the Board and standing committees through timely communications;

- Maintain progress on MOCAP's Quality Improvement Plan in collaboration with consultants and contractors;
- Ensure compliance with the agency's policies and procedures as well as federal and state regulations and directives from funding sources; assist in development of agency's strategic objectives and goals; and
- Support the Board of Directors search for candidates for a long-term Executive Director and any other management positions that are determined to be necessary.

Knowledge in the following areas are required; human services, Community Action, finance and personnel, oral and written communications, and planning and evaluation. A master's degree in an applicable field in Business, Fiscal Management or Public Administration is preferred. A bachelor's degree with extensive work experience is acceptable: 10+ years of experience in a leadership capacity preferably in a nonprofit, business entity or Community Action Agency with financial and programmatic responsibilities.

Key Financial Services for the accounting team would include:

- Budget preparation
- Manage indirect cost rate
- Payroll
- Payroll taxes
- Benefit administration
- General Ledger
- Accounts Payable
- Accounts Receivable
- Accounting for investments and assets
- Audit prep
- 990 Prep
- Annual report filing
- Annual license to solicit application
- Monthly and annual financial reporting for grants (housing, MEAP, CFP, etc)
- Account reconciliation
- Monthly financial reports to management and board
- Oversee annual audit (scheduled for July 2017)

- Compliance with grants and OMB Uniform Guidance

Instructions

MOCAP requests a concise proposal to explore options for providing short term management and leadership of the organization. In a narrative format, please address the following elements:

- 1) Provide a brief overview of your plan for providing an Interim Executive Director and fiscal management services to MOCAP. This should include:
 - a. Management of MOCAP staff
 - b. Fiscal oversight and accounting services
 - c. Client services (Food, Housing, MEAP, Emergency Services)
 - d. Completion of grant reports and funding renewals
 - e. Working with grant monitors
 - f. Familiarity with Abila (or MIP) Accounting system
 - g. Interaction with the Board of Directors
 - h. Assessment of staffing needs and search for a long-term Executive Director
 - 2) Describe the accomplishments and qualifications of the individual(s) that would be serving as Executive Director and a financial team;
 - 3) Describe your availability to be onsite working with the MOCAP staff and providing training and supervision to current staff or new hires; and
- Explain your experience managing nonprofit organizations, specifically a Community Action Agency.
 - Proposals should include a cost estimate that explains the cost per month or per hour and how much time is available to devote to MOCAP operations.
 - Please indicate if you are available to start on or before June 19, 2017.

Attachments should include:

- A price proposal and any terms or conditions
- Resumes of staff providing services
- Two professional references (from organizations you have provided similar services to or from funders who can attest to your team/staff skills and abilities)
 - Name, title, organization
 - Telephone, email and mailing address
 - What work you have done for them or what grants you have managed

Selection Process

The RFP is solely a request for expressions of interest and statements of qualifications. It is not an invitation for tenders, an offer to contract, or an invitation for offers capable of acceptance to create a contract. No contractual or other legal obligations or relations between MOCAP and any other person can or will be created hereunder. MOCAP reserves the right to reject any or all proposals, or any part thereof, make counter proposals and/or engage in negotiation with any or all firms making a proposal to obtain the required and appropriate services at a cost acceptable to MOCAP and in its sole judgment will best serve the interests of the MOCAP. The firm's qualifications cost and proposal as to the work will be considered in awarding the work.

MOCAP reserves the right to expand the response period, including but not limited, to supply further information, to make revisions in the scope of work or to solicit additional proposals from other firms. MOCAP reserves the right to cancel or amend the RFP at any time, without liability for any loss, damage, cost or expense incurred or suffered by any firm because of that change or cancellation. Each firm is solely responsible for the risk and cost of preparing and submitting its proposal to this RFP, and MOCAP is not liable for the cost of doing so or obliged to remunerate or reimburse any firm for that cost.

Proposals will be evaluated by representatives of MOCAP and such other assistance as it might require. Following the initial screening of written proposals, interviews may be arranged for members of the "short list" following which; the evaluators will provide their recommendations. MOCAP will contract for the services directly. The proposal shall include a copy of the standard professional services agreement proposed by the firm.

Selection Criteria

- Qualifications and references 30%
- Price 30%
- Specific knowledge of Community Action and demonstrated performance 40%

Due Date

Proposals are due June 9, 2017.

Questions should be directed to: XXXXX or A bidders informational meeting will be held at (day, time, location).

Apply by email to Kiesha@Mocapi.org or by mail to:

Executive Director Search Committee
Muskegon Oceana Community Action Partnership
1170 W. Southern Avenue
Muskegon, MI 49441