



Shared Services Request for Proposal

Muskegon Oceana Community Action Partnership (MOCAP), is accepting proposals for Financial and Organizational Leadership Consulting from a comparable Community Action Agency (CAA) in Michigan.

MOCAP is a private non-profit organization located in Muskegon, Michigan with an annual operating budget of approximately \$500,000; see previous years' audits, budgets and financial reports attached to this RFP for more information.

MOCAP is a nonprofit agency that receives 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 and other grants writing.

Expected Hours toward Financial services include:

- Month 1- 15-20 hours a week on site to meet Quality Improvement Plan (QIP) requirements
- Month 2- 10-12 hours a week on site, by phone/webinar or off site training to meet QIP requirements
- Month 3- 8-10 hours a week on site to provide specific tasks to meet QIP requirements.
- Month 4-6 6 hours a week/10 hours a month by phone/webinar or off site training as needed
- Month 6-12 As needed & agreed upon to complete QIP tasks.

SCOPE OF THE WORK INCLUDES: Review cost allocations plan, provide financial training to improve internal procurement and identify high risk areas within the organization. Assist MOCAP staff and Board in the development of sustainability financial plan, including grant writing strategies and best practice methods in diversifying funding. Coach and assist MOCAP Staff to:

- Create sound fiscal processes that meet OMB & CSBG Compliance.
- Develop, implement and test internal controls in needed areas, including accounts payable/accounts receivable and implement best practice methods in fiscal areas that present weaknesses for the Agency
- Meet the expectations associated with BCAEO Monitoring & QIP tasks.
- Modify internal financial & personnel policies.
- Effectively prepare for annual audits, audit reports & the associated filing process
- Evaluate & test our current General Ledger/account reconciliation policy
- Completing financial reports like monthly SOE's and Annual Budgets.

Please note that MOCAP currently performs accounting in-house using the Abilia (MIP) software.

Expected Organizational Leadership duties include 40-50 Hours of: Coaching and mentoring in best-practices:

- CSBG Application and Annual Reporting Process.
- Roma NEXTGEN Implementation
- Data management in FACSPRO.
- Programmatic sustainability and client services.
- Documentation needed for CSBG Reporting.
- Review and assist in revisions of the existing Policies and Procedures Manual
- CAA mentoring in community outreach & intake process based on CAA Best Practice Models.
- CAA best practices in regards to CSBG organizational standards and personnel practices.
- Create a monthly QIP Status Management Checklist to track progress to ensure MOCAP completes the required tasks of the QIP by 9/30/19.

Other Key responsibilities of the shared services contract would include:

- Advise the Board of Directors of potential risk areas and best practice methods to increase the Organization's sustainability. This would take place face to face initially. A schedule of board meeting dates is attached.
- Assist MOCAP's staff with completing specific tasks within the QIP.
- Monitor the agency's compliance with policies and procedures, as well as federal and state regulations and directives from funding sources.
- Assist in development of agency's strategic objectives and financial sustainability plan.

Knowledge in the following areas is required:

- Community Action, human services, finance and personnel.
- Demonstrated oral and written communication skills.
- Planning and evaluation skills.
- *10+ years of experience in a leadership capacity, ideally in a Non-Profit Community Action Agency with financial and programmatic responsibilities is strongly preferred.*

Interested CAAs or Individuals with Community Action experience should send all **Proposals** to Dionne Bowens at: Dionne@Mocap1.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 by December 21, 2018.

Instructions: MOCAP requests a concise proposal, in a narrative format, addressing how you plan to assist this agency achieve success in the following areas:

1. Explain your fiscal management accomplishments with your Community Action Agency and how they could benefit MOCAP. Please elaborate on the following:
 - Fiscal oversight and best practice accounting services.
 - Creating and implementing internal Policy & Procedures
 - Grant reports and funding compliance
 - Familiarity with Abila (or MIP) Accounting system
 2. Explain your organizational leadership accomplishments and express how it could benefit MOCAP.
 3. Explain the types of training that you could provide and how it would benefit the Agency.
- Proposals should include a cost estimate that explains the rate per month or per hour, including travel time and costs, and how much time is available to devote to MOCAP operations.

Attachments should include:

1. A price proposal and any terms or conditions
2. Resumes of the staff providing services
3. 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

Selection Process

The RFP is solely a request for expressions of interest and statements of qualifications. 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

Due Date

Proposals for Shared Services will be **due December 21, 2018** and should be submitted to:

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

Questions must be submitted in writing to:

Email Dionne@Mocap1.org