

# **REQUEST FOR PROPOSALS (RFP)**

**for  
Professional Services  
as the Auditor  
for the**

**City of Tillamook  
and  
Tillamook Urban Renewal Agency (TURA)**

**in  
Tillamook County, Oregon**

**Release Date:  
May 30, 2019**

**Responses Due:  
July 8, 2019  
2:00 PM**

**CONTACT:  
Paul Wyntergreen  
503-374-1829  
[pwyntergreen@tillamookor.gov](mailto:pwyntergreen@tillamookor.gov)**

**SUBMIT RESPONSES TO:**

**PAUL WYNTERGREEN  
CITY MANAGER/TURA ADMINISTRATOR  
2211 3<sup>rd</sup> STREET – SUITE A  
TILLAMOOK, OR 97141**

## 1.0 REQUEST

The City Council and TURA Board of Directors is seeking to increase efficiency and services and to test market competitiveness. Sealed responses marked "Request for Proposals for the City and TURA Auditor" will be accepted by the City of Tillamook at 2211 3<sup>rd</sup> Street- Suite A, Tillamook, OR 97141, Attention: Paul Wyntergreen, or by hand delivery to Paul Wyntergreen, City Manager/TURA Administrator , 2211 3<sup>rd</sup> Street – Suite A, Tillamook, until 2:00 p.m. local time, July 8, 2019.

This request is a for auditing service proposals with the CITY OF TILLAMOOK and TURA, hereafter referred to as the "CITY & TURA". As such, the CITY & TURA will be comparing the range and depth of services being offered in contrast to the rate to be billed for those services in order to increase the economic efficiency of services provided. In order to accomplish that goal, the CITY & TURA is interested in your firm's responses to the following questions:

What experience does your firm possess in relation to State Budget law and its application and interpretation for the benefit of a municipality or similar organization?

How does your firm anticipate handling the annual scheduling for both entities in order to produce final documents that provides usable information for the governing bodies as soon as possible?

What experience does your firm have in working with smaller communities where the ability to provide optimal internal control is limited by staffing?

How does your firm translate complex audit and budgetary issues into plain English for the decision-makers benefit?

How would your firm use technology to keep information flowing?

How will your firm optimize staffing and responsiveness for the benefit of the CITY & TURA?

How would your firm propose to structure its rates and billings as the Auditor of Record for the CITY & TURA?

How will your firm handle any necessary transition process?

What additional benefits will your firm bring to the CITY & TURA over and above those contemplated by this request?

Creative, workable, and efficient approaches to the above questions will receive significant weighting in the rating and ranking process described below.

Anticipated Start date is August 1, 2019, with Notice of Award to be mailed on July 16, 2019 and Contract refinement to be prepared the following week. The successful response will be used as the basis for a subsequent Personal Services contract. The City Manager/TURA Administrator will be the local contact for the Firm and will facilitate the Firm's interaction with the CITY & TURA, as it performs contractual services.

## **2.0 BACKGROUND**

The prior CITY & TURA auditor, Merina & Co. has provided services since 2013, but due to best practices of rotating audit firms periodically, they have notified the CITY & TURA they will step down and no longer provide audit services.

The CITY & TURA administrative offices are located at City Hall, but have separate audits.

Interested firms are encouraged to provide qualifications for both the CITY & TURA. The CITY & TURA's audit services are billed separately, therefore any experience with both City and Urban Renewal financing should also be listed as well as the proposed means of coordinating those two audit services.

## **3.0 DESCRIPTION OF SERVICES**

The firm shall provide a full scope of services offered (and affiliated billing rates) as outlined in this RFP. The responding firm may propose alternative components or solutions not identified in this document.

## **4.0 RFP EVALUATION CONSIDERATIONS**

All responses will be judged based on the following criteria, with the evaluation weighted as indicated:

### **4.1 Category 1 – Qualifications (35%)**

The experience of key personnel assigned to the project with regard to their documented ability to successfully provide the proposed services. The firm shall submit resumes of the key personnel who would perform the described work. Each resume shall reflect the competency of each staff member for the work, noting past experience and expertise of similar scope and complexity.

### **4.2 Category 2 – Resources and Capabilities (25%)**

The Firm's resources and responsiveness, including the description of services provided by the firm to successfully support the CITY & TURA.

The Firm shall have the capability to provide quality and responsive services with respect to the following:

- a. Ability to meet the CITY & TURA's audit needs, including the ability and willingness to work cooperatively with CITY & TURA staff;
- b. Use of current technology;
- c. Clear, creative, workable, and efficient approaches to the questions in Section 1; and
- d. Demonstrated ability to deliver the proposed services for the optimal benefit of the CITY & TURA.

### **4.3 Category 3 – Service pricing (40%)**

The proposed service rate pricing and the firm’s approach to minimizing audit service costs will be evaluated under this category.

## **5.0 INSTRUCTIONS TO FIRMS**

### **5.1 Contact Person**

For questions or clarifications regarding any element of this RFP, the following individual can be contacted:

Paul Wyntergreen, City Manager/TURA Administrator  
City of Tillamook  
2211 3<sup>rd</sup> Street – Suite A  
Tillamook, OR 97141

503-374-1829  
pwyntergreen@tillamookor.gov

### **5.2 Addenda to RFP**

In the event that it is necessary to revise any part of the RFP, addenda will be provided to all vendors who received the initial RFP or subsequently requested a copy. This includes any amendment of dates in the Schedule for Selection Process. Any addenda so issued are to be considered part of the specifications of the RFP. The CITY & TURA is not responsible for any explanation, clarification, interpretation or approval made or given in any manner except by written addenda issued by the CITY & TURA.

**If RFP holders obtain the RFP from a third party, they must notify Paul Wyntergreen in writing or by email to be on the RFP holders list.**

### **5.3 Firm’s Responsibility for response Costs**

The Firm shall be fully responsible for all response development and submittal costs. The CITY & TURA have no contractual or financial obligation as a result of the issuance of this RFP, the preparation and submission of a response by a Firm, product demonstration by a Firm, the evaluation of an accepted/rejected response, or the selection of the finalist(s).

### **5.4 Ownership of responses**

All responses and associated materials received shall become the property of the CITY & TURA.

## **5.5 Response Acceptance or Rejection**

The CITY & TURA reserve the right to reject any or all responses, to accept or reject any or all the items in the response, to waive any informality in the responses received, and to award a contract in whole or in part, if it is deemed to be in the best interest of the CITY & TURA. The CITY & TURA reserve the right to negotiate with any firm after responses are opened and the winning response is awarded, if such action is deemed to be in the best interest of the CITY & TURA.

In addition to the factors mentioned above, Firms are cautioned to review carefully all terms, conditions and specifications of the RFP prior to submittal of responses. The Personal Services may be awarded strictly on the basis of the Firm's response including the Firm's qualifications as received and without further discussion. Therefore, each response should be submitted to the CITY & TURA in the most favorable terms from both a cost and qualification standpoint.

## **5.6 All responses shall be valid through July 31, 2019.**

## **5.7 Withdrawals and Modifications**

Any responses can be withdrawn or modified in writing by contacting Paul Wyntergreen, City Manager/TURA Administrator, prior to the July 8, 2019 closing time.

## **5.8 Contract**

The successful respondent will be expected to enter into a contract with the CITY & TURA. The respondent will be required to maintain Errors and Omissions insurance for the duration of the agreement.

## **5.9 Proposed RFP and Contract Schedule**

RFP Release Date	May 30, 2019
Firm Responses Due Date	July 8, 2019
TURA Board Meeting – Approval of Firm	July 10, 2019
City Council Meeting – Approval of Firm	July 15, 2019
RFP Notice of Intent To Award	July 16, 2019
Commence Contract Preparations	July 17, 2019

The CITY & TURA reserve the right to change the schedule or terminate the selection process at any time at the CITY & TURA's sole discretion. Notice thereof will promptly be provided to parties on the CITY & TURA's RFP holders list.

## **6.0 FIRM REQUIRED INFORMATION**

The response must include:

- a. The Firm name, address, FAX, phone number, voice phone number of the Firm and Contact Person for the response.
- b. A description of the Firm;

- c. A list of the names, positions, and responsibilities of each of the Firm's personnel that will be assigned to provide services for the contract;
- d. A copy of brief resumes for the lead persons to be assigned to the CITY & TURA;
- e. The identity of the Firm's manager with corporate responsibility for performance of the services provided; and
- f. The Firm's related experience to perform the range of services requested by this RFP, including clientele reference contacts.

## **7.0 COMPLAINTS**

Any respondent who has submitted a response to the CITY & TURA and who is adversely affected by the CITY & TURA's contract award to another respondent has 5 days after issuance of the Notice of Intent to award the contract, to submit a written protest of award to the CITY & TURA. Such right to protest shall conform to the requirements of OAR 137-030-0104(1) and specify the grounds upon which the protest is based.

An adversely affected respondent must exhaust all avenues of administrative review and relief before seeking judicial review of the CITY & TURA's contract selection. Written concerns must be mailed to:

Paul Wyntergreen, City Manager/TURA Administrator  
2211 3<sup>rd</sup> Street – Suite A  
Tillamook, OR 97141