

# WRTP | BIG STEP

## REQUEST FOR PROPOSAL (RFP) FOR INDIRECT COST RATE AND ASSOCIATED ACCOUNTING SERVICES

Wisconsin Regional Training Partnership, Inc. (WRTP | BIG STEP) invites individual financial professionals and firms to submit a proposal for contracted Indirect Cost Rate (NICR) and associated accounting services.

Proposal documents must be submitted in PDF format via email to [lblumer@wrtp.org](mailto:lblumer@wrtp.org) by 5pm Friday, January 26, 2024. The most promising professionals/firms will be scheduled for virtual interviews. All candidates/vendors will be informed of a decision at the end of the process. Individuals or vendors must be available for a transition meeting with the current firm.

Send proposals to: Lindsay Blumer, President & CEO  
WRTP | BIG STEP  
[lblumer@wrtp.org](mailto:lblumer@wrtp.org)  
**Subject Line: NICR  
Accounting RFP**

Due Date and Time: January 26, 2024 by 5:00 pm

Contact Information: Toni White, COO  
WRTP | BIG STEP  
3841 W. Wisconsin Ave.  
Milwaukee, WI 53208  
(414) 937-3621

### ORGANIZATIONAL OVERVIEW

WRTP | BIG STEP is paving the way to make sure everyone has a pathway to a family-supporting career. We are curious and courageous people who boldly work toward building impactful connections between people and industry in innovative and equitable ways: we are the change-makers.

#### OUR MISSION

To enhance the ability of public and private sector organizations to recruit, develop, and retain a more diverse, qualified workforce in construction, manufacturing, and emerging sectors of the regional economy.

#### OUR VISION

Traditionally underrepresented and underemployed people, particularly women and people of color, must have access to education, training, and supportive equitable placement opportunities. This is accomplished through: Inventive pre-apprenticeship programs leading to apprenticeship placements; Access to specialized training and placement for disenfranchised populations; Consistent apprenticeship sponsorship and support; Targeted curriculum for individual and cohort learning with direct career pathways; Industry employers and labor organizations are full partners in creating career pathways and opportunities that are safe, skill-focused, and culturally competent.

This is accomplished through: Consistent implementation of evidence-based intercultural workforce learning; Developing and supporting an accessible skilled talent pipeline; Collaborative, focused working groups that identify and reduce barriers in real time; Holistic planning and technical assistance that expands career opportunities for people and industry in a dynamic workforce community. This is accomplished through: Spearheading research and trend identification and communicating results; Agile and innovative responses to unique industry needs; Provision of targeted technical assistance.

## SUMMARY OF REQUEST

WRTP | BIG STEP is currently accepting proposals for Indirect Cost Rate (NICR) and associated accounting services necessary to finalize the NICR. The purpose of this Request for Proposals (RFP) is to solicit proposals from various financial professionals and firms, conduct a fair and extensive evaluation based on criteria listed herein, and to select the vendor that best meets the immediate and ongoing needs of the organization.

## SCOPE OF WORK

WRTP | BIG STEP seeks to contract with an independent financial professional or firm to provide NICR calculation and associated accounting services to our organization with a strong focus on the Department of Labor Indirect Cost Rate Determination based on the Cost Principles and Procedures Required by 2 CFR Part 200, Subpart E & Appendix IV for Non-profit Organizations (Appendix 1).

WRTP | BIG STEP will need the services of a CPA with nonprofit experience to provide NICR financial consulting, process improvement guidance and familiarity with federal contracts. We expect that the individual/firm will be available for onsite work at our offices once per month, interaction with both the staff and board of directors at the discretion of the CEO and COO and interactions regarding monthly invoicing. Your day-to-day contact will be the COO. WRTP | BIG STEP has various federal, state and local contracts with private and government agencies, in addition to federal pass-through funding. Cost allocation, invoicing and grant reporting is a significant focus of our accounting. Preference will be given to individuals or vendors who have experience delivering accounting/bookkeeping services to small, federally and state funded nonprofit organizations.

## DELIVERABLES

- Determination of Indirect Cost Rates and Cost Allocation
- Submissions of Indirect Cost Proposals
- Tracking approval of Indirect Cost Proposals
- Reviewing and Tracking Negotiated Indirect Cost Agreements
- Resolving Indirect Cost Rate Disputes
- Retention of Records
- Working with WRTP | BIG STEP staff on Indirect Cost Allocation Bases
- Preparing and Monitoring Indirect Cost Proposal Checklist
- Update and Monitoring Indirect Cost Proposal - Review Procedures
- Additional NICR and associated accounting services as agreed upon and appropriate

## EVALUATION CRITERIA

WRTP | BIG STEP will consider the following factors when evaluating the proposals. The factors are not listed in order of importance.

- Qualifications of firm
- Qualifications and experience of the staff to be assigned to the project
- Ability to meet the Scope of Work
- Ability to maintain staff continuity as much as possible
- Cost of services
- Services beyond the Scope of Work
- References

## MINIMUM QUALIFICATIONS

Qualified vendors must possess the following knowledge, skills, and experience:

- Thorough understanding of accounting principles, procedures and practices including, but not limited to: GAAP, OMB Circulars A-110, A-122 and A-133, 2 CFR, Part 230, 28 CFR, Part 70 FFATA sub-award and executive compensation reporting requirements.
- Demonstrated experience with non-profit financial accounting, including, but not limited to: Government and foundation grants management, fund accounting, indirect expenses, cost allocations, match and reporting requirements, government procurement standards, recording program revenue, and lobbying restrictions.

## DESIRABLE QUALIFICATIONS

- Special consideration will be given to vendors that have served grantees with federal funding.
- Demonstrated ability to perform the above scope of work in a timely, efficient, and competent manner to ensure the continuity of work and ensure reliable performance of contracted deliverables.

## PROPOSAL REQUIREMENTS

### GENERAL INFORMATION

Please include a cover sheet with the following information:

- Name of contractor/firm
- Contact person/Title
- Mailing address
- Telephone number
- Email address
- Website

We will provide financial statements and our most recent form 990 upon request.

## ORGANIZATIONAL OVERVIEW AND QUALIFICATIONS

In 500 words or less, please provide the following descriptions:

- Firm/professional history and scope of practice of firm and proposed team.
  - Brief synopsis of professional experience
  - Any related professional designations and how they will directly benefit the work for our organization.
  - Organizations they serve as a volunteer or board member, including years of service.
  - Any personal relevance or meaning to our organization's mission.
- Explain how contractor/firm is a good fit with our organization, detailing experience with other non-profit clients of a similar size and scope.
- Provide details on staff turnover in the past three years, and commitment to continuity.

## STATEMENT OF WORK AND TIMELINE

In 1000 words or less, please provide the following descriptions:

- Proposal to fulfill the Scope of Work and Deliverables noted above.
- Outline key steps and persons responsible, level of efforts, and supervision required.
- Your preferences and expectations when working with clients.
- Please describe your availability to be present in our Milwaukee office per the SOW as needed.
- Describe how your firm will approach the transition process, if we move from our current firm.

## PROJECT MANAGEMENT AND FEES

Please describe the following:

- Set forth your fee proposal for the included services, with whatever guarantees can be given regarding increases in future years.
- Provide your proposed fee for the required monthly invoicing, quarterly financial reports, and tax preparation.
- Furnish standard billing rates for classes of professional personnel for each of the last three years.

## REFERENCES

Please provide the following:

- A list of non-profit clients (name only) for whom the contractor/firm has provided similar contracted accounting services.
- Contact information for three (3) specific professional references including at least two (2) current non-profit clients, for whom the contractor has provided similar accounting services.

## ADDITIONAL TERMS

During the evaluation process, WRTP | BIG STEP reserves the right to request additional information or clarifications from proposers and the right to reject any or all proposals. The costs of developing proposals are entirely the responsibility of the individual or vendor and shall not be charged in any manner to WRTP | BIG STEP. This includes, but is not limited to, the direct cost of vendor personnel assigned to prepare vendor's response to the RFP and any out-of-pocket expense (including, but not limited to travel accommodation, supplies, etc.) incurred by the individual or vendor in preparing the response to the proposal. Please note that all materials submitted in response to this RFP become the property of WRTP | BIG STEP upon delivery and shall be appended to any formal documentation, which would further define or expand the contractual relationship between WRTP | BIG STEP and the contracted vendor. Each applicant, as an express condition for the WRTP | BIG STEP consideration of such proposal, agrees that the contents of every other proposal submitted by other applicants with respect to this RFP are confidential, proprietary and trade secret information in all technical areas, and waives any right to access such proposals during the RFP process. No submissions or supporting documentation will be returned to the submitting applicant. Neither party shall be liable for disclosures that are required by law.