

# Columbia River Fire & Rescue District



## REQUEST FOR PROPOSAL

### General Accounting Services

ISSUE DATE: November 29, 2024

ISSUED BY: Columbia River Fire & Rescue District

PROCUREMENT CONTACT: Eric Smythe, 503-397-2990 [smythee@crfr.com](mailto:smythee@crfr.com)

PROPOSALS DUE: December 30, 2024 at 5:00 PM PST

**I. INTRODUCTION.**

**A. Request for Proposals Advertisement.**

General Accounting Services

Columbia River Fire & Rescue District

Date of Issue: November 29, 2024  
Closing Time and Date: 5:00 PM PST, December 30, 2024  
Proposal Opening: 5 PM PST, November 29, 2024  
Procurement Contact: Eric Smythe smythee@crfr.com

**PUBLISHED NOTICE**

**REQUEST FOR PROPOSAL**

The Columbia River Fire & Rescue District (the “District”) requests proposals from experienced accounting firms or individual accountants to serve as the District’s general accountant. It is the intent of the District to enter into a contract with the selected firm or individual which will include specified rates for the services that are required to be provided for a specified scope of work. Respondents to this request will be evaluated based upon their qualifications, prior experience, associated fees, and other relevant factors.

Copies of the Request for Proposal document may be obtained from Eric Smythe at [www.crfr.com](http://www.crfr.com), or they may be viewed at Columbia Fire & Rescue, 270 Columbia Blvd., St. Helens, OR 97051. Proposals are due no later than 5 **P.M. PST** 12/30/2024 and shall be delivered to the Procurement Contact at Columbia Fire & Rescue, 270 Columbia Blvd., St. Helens, OR 97051. Proposals received after the specified due date and time will not be considered. If deemed necessary, the District will conduct interviews of the successful proposers; interviews could potentially be scheduled for 01/09/2025.

All proposers must be Certified Public Accountants licensed by the Oregon Board of Accountancy. Failure to meet licensing requirements will be sufficient cause to reject proposals as non-responsive. For this service, the provisions of the contract attached to the RFP will apply. This solicitation does not obligate the District to pay any costs incurred in preparation or presentations, or to select any proposer who responds. The District reserves the right to reject any proposal not in compliance with all prescribed requirements and may reject for good cause any or all proposals upon a written finding that it is in the public interest to do so.

The District will not hold a pre-proposal conference for this RFP.

Published 11/29/2024.

**B. Overview.** The District is seeking a general accountant to provide the following general accounting services, which are described in more detail in Exhibit 1 to the sample contract attached to this RFP as Attachment C: monthly bookkeeping and accounting services; budget support; audit support; and training/additional support.

**C. RFP Documents.** The RFP documents consist of the following:

- Request for Proposal – General Accounting Services
- Attachment A – Proposer Certification Form
- Attachment B – Proposer Reference Form
- Attachment C – Sample Contract

**II. TIMELINE AND DEADLINES.** The timeline for, and deadlines associated with, this RFP are set forth below. The District reserves the right to deviate from the schedule set forth in this Section II.

ACTIVITY	DATE
Issuance of Request for Proposal	
Pre-proposal Conference	
Deadline for Questions/Clarifications/Protest of Solicitation Documents	NTD: Default under the rule is not less than ten days prior to the date the proposals are due.
Proposals Due	
Notification of Interviews	
Interviews	
Notice of Intent to Award	
Deadline for Filing Protest of Award	NTD: Not less than seven days from the date of Notice of Intent to Award.
Anticipated Contract Start	

**III. GENERAL TERMS.**

**A. RFP Clarifications and Protests; Addenda.**

1. Informal Questions or Requests for Clarification. Any proposer requiring clarification of the information provided in this RFP may submit specific questions or comments, in writing only, to the Procurement Contact shown on page 1 of this RFP. Email is the preferred form of written communication. The deadline for submitting such questions is set forth in Section II.
2. Protest of RFP or Contract Documents. Any proposer wishing to protest this RFP or any provision, specification, or contract term contained in the solicitation documents, must submit such questions, comments, or protests in writing to the Procurement Contact shown on page 1 of this RFP. The deadline for submitting such protests is set forth in Section II.

3. Content of Solicitation Protest. The prospective proposer's written solicitation protest must include all of the following as required under ORS 279B.405 and OAR 137-047-0730:
  - a. Sufficient information to identify the solicitation that is the subject of the protest;
  - b. The grounds that demonstrate how the procurement process is contrary to law or how the solicitation document is unnecessarily restrictive, is legally flawed, or improperly specifies a brand name;
  - c. Evidence or supporting documentation that supports the grounds on which the protest is based; and
  - d. A statement of the desired changes to the RFP process or the RFP documents that the prospective proposer believes will remedy the conditions upon which the prospective proposer based its protest.
4. Extension of Due Date. The District may extend the proposal due date and time for any reason, including but not limited to if it determines an extension is necessary to consider and respond to a properly filed protest, request for change, or request for clarification.

**B. Addenda.**

1. If the District determines that a change or clarification to the RFP or the RFP documents is necessary, such information, clarification, or interpretation will be supplied in a written addendum, posted on [www.crfp.com](http://www.crfp.com).
2. Addenda shall have the same binding effect as though contained in this RFP.
3. Statements made by the District's representatives are not binding on the District unless confirmed by a written addendum.

**C. Confidential Information.**

1. The District is subject to the Oregon Public Records Law (ORS 192.311 to 192.478), which requires the District to disclose all records generated or received in the transaction of District business, except as expressly exempted under the Oregon Public Records Law or other applicable law.
2. Pursuant to ORS 279B.060(6), proposals will not be open for public inspection until the Notice of Intent to Award is issued. Thereafter, the District will not disclose records submitted by a proposer that are exempt from disclosure under the Oregon Public Records Law, subject to the following procedures and limitations:

The proposer must mark all proposal pages containing the records it has determined as confidential under Oregon Public Records Law and must segregate those pages in the following manner:

- a. Such pages must be clearly marked “Confidential” on each page of the confidential document.
  - b. Proposer must separate confidential pages from its other proposal pages by providing the confidential pages to the District in a separate envelope or package.
  - c. In its proposal, proposer must cite the specific statutory exemption in Oregon Public Records Law exempting such pages from disclosure.
  - d. Subsections (a) and (b) above will prevail in the event these provisions conflict with formatting or response instructions elsewhere in this document.
  - e. Proposers may not mark an entire proposal confidential. Should a proposal be submitted in this manner, the District will hold no portion of the proposal as confidential, unless such a portion is segregated as required under subsection (b) above and is determined exempt from Oregon Public Records Law.
3. Notwithstanding the above procedures, the District reserves the right to disclose information that the District determines, in its sole discretion, is not exempt from disclosure or that the District is directed to disclose by the County District Attorney or a court of competent jurisdiction.
  4. Prior to disclosing such information, the District will make reasonable attempts to notify the proposer of the pending disclosure.

**D. Additional Terms.**

1. Proposers shall bear sole responsibility for all costs incurred in preparing and providing their proposals in response to this RFP. The District is not liable to any proposer for any loss or expense caused by or resulting from the cancellation of a solicitation or rejection of a proposal.
2. All material submitted for any portion of a proposal in response to this RFP, or during any tier of this solicitation, shall become the property of the District and will not be returned to proposers.
3. Proposals shall remain valid for a period of 90 days following the proposal due date.

4. The District may cancel this procurement or reject any or all proposals in accordance with ORS 279B.100.
5. The District reserves the right to investigate references, including customers other than those listed in a proposer's proposal. This inquiry may include without limitation investigation of past performance of any proposer with respect to its successful performance of similar projects, compliance with specifications and contractual obligations, completion or delivery of a project on schedule, and its lawful payment of employees and subcontractors.

#### IV. PROPOSAL REQUIREMENTS AND EVALUATION.

##### A. Submittal Requirements.

1. Date, time, and location. Interested proposers must submit their proposals no later than the due date identified in Section II. Proposals shall be submitted to the Procurement Contact identified on page 1 of this RFP at the following address:

Columbia River Fire & Rescue District  
270 Columbia Blvd.  
St. Helens, OR 97051

No Facsimile (FAX) transmitted proposals will be accepted.  
No electronic proposals will be accepted.

2. Late submission. A proposal shall be considered late if received at any time after 5:30 PM, on the proposal due date identified in Section II of this RFP. Proposals received after the specified time will be rejected. It is proposer's sole responsibility to ensure that proposals are submitted on time and to the correct location.
3. Number and Form. Proposers shall submit 1 hard copy proposals in a sealed box or envelope to the Procurement Contact at the address identified in Section IV.A.1. The proposals shall be distinguished in separate sections in response to the detailed proposal requirements. Proposals must include a one-page cover letter, be double-sided when possible, and prepared simply and economically (comprised of recyclable and, ideally, recycled materials). Proposals are limited to 50 pages and minimum 12 font print (**not** including a cover letter, proposal section dividers, resumes of proposed personnel, and Attachment A). One double-sided sheet is considered equal to two pages. No other material should be submitted.
4. Proposal Certification Statement. A proposal certification statement (Attachment A) shall be filled out and signed, and accompany each proposal. Signatures should be in ink; an electronic signature will not be

accepted in lieu of an original handwritten signature. The certification shall bind the proposer to perform the services for the fees stated in their proposal. Failure to submit a signed proposal certification statement will result in disqualification of the proposer.

5. Modification or Withdrawal of Proposal. Prior to the proposal due date and time identified in Section II, any proposal may be modified or withdrawn in person with proper identification, or by issuing a written request on company letterhead, signed by an authorized representative. If issuing a modification or withdrawal request, the request must be received by the District before the proposal due date and time.

## **B. Detailed Proposal Requirements.**

Every proposal must reply to each of the following items. Responses must be in the same order listed below. Concise and direct answers are encouraged.

By listing individuals in the proposal, the proposer guarantees that these individuals will be available to work with the District as needed. The District reserves the right to approve or reject any changes to the proposed personnel. The District further reserves the right to request a substitution of personnel if deemed to be in the best interest of the District.

1. Cover Letter. Proposals must include a cover letter with the following information:
  - a. RFP Title;
  - b. RFP Number;
  - c. Name of Proposer;
  - d. Name(s), title(s), mailing address, telephone number(s), fax number(s) and email, address(es) of the person or persons who have authority to negotiate and contractually obligate the proposer for the purpose of this RFP and who has sufficient knowledge to fully address all matters and respond to all inquiries related to the proposal;
  - e. Date of submission;
  - f. Number of years the proposer has been in business under its current business name and any other names the proposer has operated under; and
  - g. The number of years the proposer has operated in Oregon;

2. Background.
  - a. Provide a brief description of proposer's history and its capabilities.
  - b. Background of key professionals within proposer's firm or organization that would be available to the District, including licenses held.
  - c. Provide evidence of any relevant licenses that proposer holds.
3. Experience.
  - a. Provide a description of proposer's experience working with public bodies of a similar size or type to the District.
  - b. Provide a description of proposer's experience performing the types of services described in Exhibit 1 to the sample contract attached to this RFP as Attachment C.
  - c. Provide a description of proposer's experience working with both staff and governing boards of client organizations.
4. Staffing.
  - a. Describe the experience of proposed key professionals and how each is ideally suited to provided services to the District.
  - b. Describe the capacity of proposer to perform the scope of work identified in Exhibit 1 to the sample contract attached to this RFP as Attachment C.
5. References.
  - a. Complete the proposer reference form attached to this RFP as Attachment B.
  - b. You may provide up to three supporting letters from previous clients that address proposer's ability to meet deadlines and quality of work.
6. Fees and Compensation.
  - a.
  - b.
  - c.



**C. Proposal Evaluation.**

1. Evaluation Committee. An evaluation committee, consisting of not less than three individuals, will evaluate the proposals. Each evaluator will independently evaluate and score proposals in accordance with the Proposal Evaluation Criteria set forth in Section IV.D.1 below.
2. Scoring. As set forth in Section IV.C.1 above, each evaluator will independently score the proposals in accordance with the evaluation criteria. The District will average the scores per category and then sum the category averages for a total written evaluation score for each proposal.

**D. Evaluation Criteria.**

1. Proposal Evaluation Criteria.

<b>Criteria</b>	<b>Maximum Points Available</b>
Firm Background	20
Experience	20
Staffing	20
Fees and Compensation	20
References	20
	100 (Total Points Available)

2. Interview Evaluation Criteria.

<b>Criteria</b>	<b>Maximum Points Available</b>
Firm Background	25
Experience	25
Staffing	25
Fees and Compensation	25
	100 (Total Points Available)

**E. Invitation for Interview.**

1. After scoring the proposals under Section IV.C.2 above, the evaluation committee may conduct interviews with one or more top-ranked proposers if the District determines in its sole discretion that interviews are necessary or desirable.
2. The number of proposers selected for interviews is at the sole discretion of the evaluation committee.
3. If the District decides to hold interviews, the District will notify all proposers in writing. The District will include the names of the proposers

selected for interviews as part of the notice. The District will also include the date, time, and location of the interviews.

4. The District may distribute a list of anticipated interview questions and/or presentation expectations to the proposers selected for interviews if the District determines, in its sole discretion, that it is in the best interests of the District and proposers do so.
5. No additions, deletions, or substitutions may be made to proposals during the interviews/presentations that cannot be viewed as clarification.

**F. Interview Evaluation.**

1. Each evaluator will score the interviews in accordance with the Interview Evaluation Criteria set forth in Section IV.D.2 above.
2. The District will average the interview scores per category and then will sum the category averages for a total interview evaluation score for each proposer.
3. The District will sum the proposal evaluation score and the interview evaluation score to achieve a total score per proposer.

**V. AWARD AND NEGOTIATIONS.**

**A. Notification of Intent to Award.** The District will notify proposers of its intent to award by posting such notification on website and by email.

**B. Negotiation.**

1. After the District has issued the Notice of Intent to Award, the District shall commence serial negotiations with the highest-ranked eligible proposer.
2. At any time during negotiations, the District may terminate negotiations with the highest-ranked proposer, or the eligible proposer with whom it is currently negotiating if the District believes that proposer is not discussing or negotiating in good faith, or that further discussions or negotiations with that proposer will not result in the parties agreeing to the terms and conditions of a contract in a timely manner.
3. If the District terminates negotiations with an eligible proposer, the District may then commence negotiations with the next highest-ranked eligible proposer.
4. The District reserves the right to negotiate final contract terms with the selected proposer(s) to the fullest extent allowed by law and as in the best interest of the District.

**C. Award of Contract.** If the District awards a contract pursuant to this RFP it will award a contract to the responsible proposer whose proposal the District determines in writing is the most advantageous to the District based upon the evaluation process and criteria described in this RFP, applicable preferences, and the outcome of any negotiations authorized by this RFP.

**D. Protest of Contract Award.**

1. A proposer may protest the Intent to Award a contract, provided:
  - a. The proposer is adversely affected because the proposer would be eligible to be awarded the contract in the event that the protest were successful; and
  - b. The reason for the protest is:
    - i. All lower bids or higher ranked proposals are nonresponsive;
    - ii. The District has failed to conduct the evaluation of proposals in accordance with the criteria or processes described in the RFP documents;
    - iii. The District has abused its discretion in rejecting the protestor's bid or proposal as nonresponsive; or
    - iv. The District's evaluation of bids or proposals or the District's subsequent determination of award is otherwise in violation of ORS 279B or 279C.
2. Protests must be made in writing and addressed as follows:

**PROTEST OF AWARD: RFP NO. #####-#####  
Eric Smythe/ 270 Columbia Blvd. St. Helens, OR 97051  
Phone: 503-397-2990  
Email: smythee@crfr.com**
3. All protests must be received by Eric Smythe no later than the date and time specified in Section II for submitting such protests.
4. Protests must specify the grounds for the protest including the specific citation of law, rule, regulation, or procedure upon which the protest is based. The judgment used in scoring by individual evaluators is not grounds for a protest.
5. Untimely protests, or protests which fail to cite the specific law, rule, regulation, or procedure upon which the protest is based, shall be dismissed. An issue that could have been raised by request for clarification or protest of the solicitation is not a ground for protest of award.

## **VI. CONTRACT TERMS AND CONDITIONS.**

**A. Contract Award and Term.** The District intends to award a single contract as a result of this RFP. The contract term will be 3 years.

### **B. District Contract.**

1. Proposers are advised to thoroughly review and familiarize themselves with the sample contract included as Attachment C.
2. The successful proposer will be invited to enter into a contract in substantially the form attached hereto as Attachment C.
3. Any contract resulting from this RFP will be based on the RFP documents and in compliance with Oregon's Public Contracting Code.

**C. Insurance.** Proposers must meet the insurance requirements set forth in the sample contract and are advised to carefully review the insurance requirements before submitting a proposal.

**ATTACHMENT A**

**Proposal Certification Statement Form  
PROPOSAL FORM**

**Project Name:**       **General Accounting Services**

**Proposal Due Date:** **Insert date and time**

**Proposal From:** \_\_\_\_\_

The undersigned hereby proposes to provide to the District all materials, services, and labor necessary to perform all work in connection with the services described in this Request for Proposals in strict accordance with the terms of this Request for Proposals.

*The proposer must respond to each of the yes/no prompts below, otherwise the proposal will not be considered.*

**1. Addenda:**

*Complete this section if any Addenda were issued and received.*

Proposer has received Addenda \_\_\_\_ through \_\_\_\_.

**2. Nondiscriminatory Subcontractor Participation:**

Proposer certifies that it has not and will not discriminate against a subcontractor in awarding a subcontract related to this RFP because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a veteran-owned business, or an emerging small business that is certified under ORS 200.055.

Yes         No

**3. Reciprocal Preference Law/Resident Bidder:**

Proposer certifies that proposer is a “resident bidder” as defined in ORS 279A.120:

Yes         No

**4. Oregon Office for Business Inclusion and Diversity Certification:**

Please indicate whether your business is certified under ORS 200.055 as any of the following:

Minority Business Enterprise         Women Business Enterprise  
 Emerging Small-Business Enterprise         Service-Disabled-Veteran Enterprise

**5. Licensure:**

Proposer certifies that it maintains all certifications required by law and under this RFP to perform the services described in this RFP.

Yes       No

**6. Proposer's Signature and Identification:**

I hereby certify that this proposal is genuine and that I have not entered into collusion with any other entity or person relating to this proposal.

*[Signature page follows]*

Name of Proprietor, Partnership, or Corporation:

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Authorized Official's Name and Title (Please Print):

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Signature of Authorized Official: \_\_\_\_\_ Date Signed: \_\_\_\_\_

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Street Address

City, State, and Zip Code

---

Mailing Address (if different from street address)

City, State, and Zip Code

---

Phone Number

---

Employer Federal ID Number

---

License Number

## ATTACHMENT B

### PROPOSER REFERENCE FORM

Provide a minimum of three references from different projects that the District may contact regarding the quality of service that you or your firm has provided on projects of comparable size and scope. The list of references must include the following information:

1. Company Name: \_\_\_\_\_  
Contact Name and Phone #: \_\_\_\_\_  
Address: \_\_\_\_\_  
Dates of Service: \_\_\_\_\_  
Contract Amount: \_\_\_\_\_
  
2. Company Name: \_\_\_\_\_  
Contact Name and Phone #: \_\_\_\_\_  
Address: \_\_\_\_\_  
Dates of Service: \_\_\_\_\_  
Contract Amount: \_\_\_\_\_
  
3. Company Name: \_\_\_\_\_  
Contact Name and Phone #: \_\_\_\_\_  
Address: \_\_\_\_\_  
Dates of Service: \_\_\_\_\_  
Contract Amount: \_\_\_\_\_



**ATTACHMENT C**

**Agreement for Personal Services  
GENERAL ACCOUNTING SERVICES**