

**REQUEST FOR QUALIFICATIONS/PROPOSALS**  
**FOR**  
**FINANCIAL PRACTICES ANALYSIS**

**RFQ/P #24-0802**

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Request for Qualifications/Proposals Issued: February 20, 2024

# Request for Qualifications/Proposals for Financial Practices Analysis

## **I. OBJECTIVE**

The overall objective of this Request for Qualifications/Proposal is to permit firms the opportunity to submit their relevant school district financial experience and client references for consideration to provide the District with an analysis of current financial practices, Payroll, and Accounting procedures. Provide the District with recommendations for process enhancements to improve fiscal accountability.

### **Background**

The Sacramento City Unified School District is the 12th largest school district in California and one of the 100 largest in the United States, serving over 43,000 students on over 75 campuses. Neighborhoods served range from leafy affluent areas around the Capitol to federal housing projects. 72% of SCUSD students qualify for a free or reduced-price lunch; at 26 schools, 90-100% of students meet this federal S R Y H U W \ W K U H V K R O G L Q s Employment rate Over 60% of students are High W R a V X the national average.

## **II. INSTRUCTIONS**

Respondents to this RFQ/P must mail or deliver, in a sealed package; one (1) unbound hard copy, four (4) bound copies and one (1) electronic copy (flash drive, Word or PDF format) of the complete proposal no later than **2:00 p.m. on March 15, 2024** to the following address:

Sacramento City Unified School District  
Purchasing Services  
5735 47<sup>th</sup> Avenue  
Sacramento, CA 95824

The sealed envelope shall be P D U N H G R Q W K H R X W V L G H O R Financial Practices F R U Q H Analysis RFQ/P 24-0802 , W L V W K H 3 U R S R V H U V V R O H U H V S R Q V L E L O I received prior to the scheduled closing time for receipt of proposals. No corrected or resubmitted proposals will be accepted after the deadline.

This Request for Qualifications/Proposals does not commit the Sacramento City Unified School District to award a contract or pay any costs incurred in the preparation of a proposal responsive to this request. The District reserves the right to accept all or part of any proposal or to cancel in part or in its entirety this Request for Proposals. The District further reserves the right to accept the proposal that it considers to be in the best interest of the District.

All requirements described in this document must be addressed in your proposal. Non-responsive proposals will not be considered. All proposals, whether selected or rejected, shall become the property of the District. Firms are responsible for checking the website periodically for any updates or revisions to the RFQ/P.

All questions must be submitted via email to the attention of Robert Aldama –Purchasing Manager II at [Robert-Aldama@scusd.edu](mailto:Robert-Aldama@scusd.edu)

**CALENDAR OF EVENTS (subject to change)**

DATE / TIME	ACTION
February 20, 2024 / TBD	1 <sup>st</sup> Legal advertising & release of RFQ/P
March 08, 2024 / 2:00 p.m.	Deadline for Questions. Questions must be emailed to: Robert Aldama, Purchasing Manager II, Robert-Aldama@scusd.edu
March 11, 2024 / 2:00 p.m.	Issue responses to questions in the form of an addendum to the RFQ/P
<b>March 15, 2024 / 2:00 p.m.</b>	<b>Deadline for Submission of RFQ/P</b>
March 20, 2024 / TBD	Selection Advisory Committee evaluation of responses
March 21 - 22, 2024 / TBD	Oral Interview (if requested)
April 04, 2024 / TBD	Anticipated Award Recommendation to Board of Education

**III. SCOPE OF SERVICES**

Perform fieldwork interviews of key District Management and applicable staff members.  
 Provide a financial practices review, Payroll, and Accounting procedures analysis, fiscal accountability process enhancement, Payroll operations process update, internal processes optimization, and financial reconciliation review.  
 Complete a draft report based on fieldwork performed. Draft report shall include at the minimum the following elements:

- x **Compliance/Internal Audit Assessment:**
  - a. Evaluate existing procedures to identify areas that comply with relevant laws, regulations, and

- x **Identify Concerns, Needs, and Blind Spots:**
  - a. Identify and document any concerns or challenges encountered in the Payroll and Accounting procedures.
  - b. Determine specific needs that are currently unmet or inadequately addressed.
  - c. Identify blind spots or areas where potential risks may not be adequately addressed.
  
- x **Identify Areas of Strength:**
  - a. Highlight aspects of the current procedures that demonstrate strength and effectiveness.
  - b. Acknowledge successful practices and positive outcomes.
  
- x **Identify Areas of Improvement:**
  - a. Clearly outline specific areas where improvements are needed in both Payroll and Accounting procedures.
  - b. Prioritize improvements based on urgency and impact.
  
- x **Assist in Updating Fiscal Accountability Process:**
  - a. Collaborate with relevant stakeholders to draft an updated fiscal accountability process within the accounting framework.
  - b. Ensure the incorporation of best practices, transparency, and accountability in financial management.
  
- x

- x **Assist with Implementation Plan:**
  - a. Develop a phased plan for implementing recommended changes, including the updated fiscal accountability process, Payroll Operations process updates, internal processes optimization, reviewed financial practices improvements, financial reconciliation enhancements, better use of the district ERP system, Payroll and Accounting manual updates, and additional opportunities for increased efficiency, effectiveness, and collaboration.
  - b. Include timelines, responsible parties, and key milestones.
  
- x **Monitoring and Evaluation:**
  - a. Establish a framework for ongoing monitoring and evaluation of the revised procedures, fiscal accountability processes, updated Payroll Operations, optimized internal processes, improved financial reconciliations, reviewed financial practices, ERP system optimization, Payroll and Accounting manual updates, and the implementation of efficiency and collaboration initiatives.
  - b. Define metrics to measure the success of implemented changes.
  
- x **Reporting:**
  - a. Regularly report progress to stakeholders.
  - b. Provide a final comprehensive report summarizing the analysis, recommendations, implementation outcomes, the impact of efficiency and collaboration initiatives, and the optimization of the ERP system, Payroll and Accounting manuals.
  
- x **Documentation:**
  - a. Document all findings, recommendations, changes made to Payroll and Accounting procedures, the updated fiscal accountability process, revised Payroll Operations process, optimized internal processes, improved financial reconciliations, reviewed financial practices, ERP system optimization, Payroll and Accounting manual updates, enhancements, and the implementation plan for future reference.
  
- x **Provide Recommendations:**
  - a. Propose actionable recommendations to address all items above.

**Conclusion and Deliverables.**

Schedule exit meeting in person or remote. Deliver Final Report to District.

**IV. CONTENTS FOR PROPOSALS**

In order for proposals to be considered, said proposal must be clear, concise, complete, well organized and demonstrate respondents qualifications. The quality of answers, not length of responses or visual exhibits is important in the proposal.

The proposal shall be organized in the format listed below. Respondents shall read each item carefully and answer each of the following items accurately to ensure compliance with District requirements.

A.









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ARTICLE 3. PAYMENT .

District agrees to pay Contractor for services satisfactorily rendered pursuant to this Agreement as follows:

Fee Rate \$\*\*\*INSERT DATA HERE\*\*\* per hour or \$\*\*\*INSERT DATA HERE\*\*\* per day of services as may be requested by District, not to exceed a maximum of \*\*\*INSERT DATA HERE\*\*\* hours/days of service. District shall\*\*\*INSERT DATA HERE\*\*\*not pay travel and other expenses. Total fee shallnot exceed \*\*\*INSERT DATA HERE\*\*\* Dollars (\$\*\*\*INSERT DATA HERE\*\*\*).

acknowledges and agrees that it is the sole responsibility of the Contractor to report as income its compensation from the District and to make the requisite tax filings and payments to the appropriate federal, state, and/or local tax authorities. The Contractor shall be responsible for any tax withholding by the District for the payment of social security, unemployment, or disability insurance, or any other similar state or federal obligation.

The Contractor agrees to defend, indemnify and hold the District harmless from any and all claims, losses, liabilities, or damages arising from any contention by a third party that an employee relationship exists by reason of this Agreement.

The District assumes no liability for workers' compensation or liability for loss, damage or injury to persons or property during or relating to the performance of services under this Agreement.

#### ARTICLE 7. FINGERPRINTING REQUIREMENTS.

\*\*\*INSERT DATA HERE\*\*\*

Contractor agrees that any employee it assigns to provide services directly to, or have any contact with, pupil(s) of the District, shall be subject to the fingerprinting/background and TB requirements set forth in the California Education Code. Any employee that Contractor assigns to provide services directly to, or have any contact with, pupil(s) of the District shall have undergone the background check required in §45125(b)&(c), including response by DOJ, before any service or contact with pupil(s) of the District is allowed.

Pursuant to Education Code §45125.1, Contractor shall provide a complete list to the District of all employees cleared by the DOJ who will provide services under this Agreement (or MOU) and shall certify in writing to the District that Contractor has no information that any of its employees who are required to have their fingerprints submitted to the Department of Justice (DOJ), and who may come in contact with pupil(s) of the District, have been arrested or convicted of a crime. Contractor shall notify the District if they have been advised of any such arrest by the DOJ.

Contractor shall continuously monitor through DOJ, and obtain subsequent arrest notification from DOJ, regarding any individual whose fingerprints were submitted pursuant to §45125 who is or will be providing service directly to, or has contact with, pupil(s) of the District. Upon receipt of a subsequent arrest notification from DOJ, Contractor shall, within 24 hours, notify the District of such arrest notification and prohibit the employee from having any further contact with any pupil(s) of the District as defined in §45122.1 or the notification has been withdrawn by DOJ. Any employee is disqualified from working for the District pursuant to the requirements of the California Education Code, even if only temporarily. Contractor agrees to provide a replacement employee within 15 days of receiving notification that the previous employee has been disqualified.

Contractor further agrees and certifies that any employee providing services directly to any pupil(s) of the District whether qualifying as a Mandated Reporter as defined by California Penal Code §11165.7(a), or not, shall be provided annual training on child abuse and mandated reporting of child abuse or neglect utilizing an evidence-based training method which includes training on how to recognize conduct of adults which may trigger reasonable suspicion of abuse or neglect. Contractor shall ensure that all employees are trained on these behaviors.





ATTACHMENT B

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ARTICLE 18. APPLICABLE LAW/VE NUE.

This Agreement shall be governed by and construed in accordance with the laws of the State of California. If any action is instituted to enforce or interpret this Agreement, venue shall only be in the appropriate state or federal court having venue over matters arising in Sacramento County, California, provided that nothing in this Agreement shall constitute a waiver of immunity to suit by the District.

ARTICLE 19. RATIFICATION BY BOARD OF EDUCATION.

To the extent the Agreement exceeds an expenditure above the amount specified in Education Code section 17605, this Agreement, as to any such exceeded amount, is not enforceable and is invalid unless

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EXHIBIT A

CONTRACTOR CERTIFICATION of COMPLIANCE

Fingerprinting : Education Code section 45125.1 provides that any contractor providing school site administrative or similar services to a school district must certify that employees who may come into contact with pupils have not been convicted of a serious or violent felony as defined by law. Those employees must be fingerprinted and the Department of Justice (DOJ) report to the Contractor if they have been convicted of such felonies. No person convicted may be assigned to work under the contract. Depending on the totality of circumstances including (1) the length of time the employees will be on school grounds, (2) whether pupils will be in proximity of the site where the employees will be working and (3) whether the contractors will be working alone or with others, the District may determine that the employees will have only limited contact with pupils and neither fingerprinting nor certification is required.

The District has determined that section 45125.1 is applicable to this Agreement, and that the employees assigned to work at a school site under this Agreement will have only limited contact with pupils if the following conditions are met at all times:

1. Employees shall not come into contact with pupils or work in the proximity of pupils at any time except under the direct supervision of school district employees.
- 2.