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# Request for Proposals DRAFT

## Town of Upper Marlboro Accounting Services

RFP # UM 2025-01

**Project Overview:** The Town of Upper Marlboro is requesting proposals from qualified firms of public accountants (hereafter referred to as "Firm(s)") to perform general accounting services in accordance with the provisions included in this request for proposal. The firm will assist the Town Administrator with routine bookkeeping and financial records on a monthly basis and assist with annual audit and fiscal year budget preparations.

**Scope of Work:** Qualified applicants should be able to provide the below services to the Town:

- Review and recommend accounting recording processes (current fiscal year and moving forward)
- Accounting principles for monthly records
- Clean up and input (QuickBooks) the scheduled fixed asset inventory
- Ongoing assistance with accounting, audits, and fiscal year budget
- Assist with internal control policy

**Level of Experience:** Applicant firms must have the following experience:

- High level of experience with government accounting, bookkeeping, and auditing.
- Ability to manage multiple issues and priorities on deadline.
- Individual managing the Towns account must be a Certified Public Accountant
- Individual or firm must have a thorough understanding of local, state, and/or federal government operations, including the legislative process.
- Individual or firm must have prior experience working within the Washington, DC region, including Prince George's and/or Montgomery counties.
- Individual or firm must be able to work independently, but also thrive as part of a fully functional team
- Expert familiarity with using QuickBooks software.

**Budget:** The annual budget for this service shall not exceed \$30,000 per year.

**Proposal Instructions:** Bidders are requested to provide the following information in their proposal:

- General qualifications and experience of the company in the provision of accounting and auditing services
- Curriculum vitae of personnel assigned to this engagement
- Details of the types of services available
- References from clients
- Proposed contract rates and terms
- Any other information that would help the review team to better understand your proposed.

**Deadline:** Responses to this RFP are to be submitted by XXXXXX, 2025 by 5pm EST. By Mail: Town of Upper Marlboro P.O. Box 280 Upper Marlboro MD 20773. By Email: [Info@UpperMarlboroMD.gov](mailto:Info@UpperMarlboroMD.gov). In-Person: Upper Marlboro Town Hall 14211 School Lane Upper Marlboro MD 20772.

**Selection Process and Criteria:** This RFP is for a 24-month contract with the Town, with the option for renewal beginning July 1<sup>st</sup>, 2027. Proposals will be evaluated based on:

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| General Experience of the Firm and responsiveness to the proposal | 20% |
| Qualifications and experience of assigned personnel               | 40% |
| Proposed terms  | 20% |
| Breadth of services available                                     | 20% |

Late or faxed proposals will not be accepted. The Town reserves the right to accept or reject any proposal submitted and is not obligated to enter into a contract on the basis of any proposal submitted in response to this request. No payment will be made for costs incurred in the preparation and submission of a proposal in response to this request.

The Town will evaluate all submitted proposals. The object of the evaluation and selection process is to identify the proposal that, in the Town's opinion, offers the best value for the services requested. In assessing best value, the Town:

- May not necessarily accept the lowest proposal, and may, in its sole discretion, accept any proposal and may waive any minor informality or irregularity in proposals
- Has no obligation to receive further information, whether written or oral, from any Proponent, nor to disclose the nature of any proposals received

**Point of Contact:** Clayton A. Anderson, Town Administrator for the Town, can be reached at 301-627-6905 or [canderson@uppermarlboromd.gov](mailto:canderson@uppermarlboromd.gov) with any questions.

*Thank you for your interest in this Request for Proposals from the Town of Upper Marlboro.*