

Proteus Inc.

REQUEST FOR PROPOSAL
msilva@proteusinc.org

PROJECT NAME: Budget Template Creation

Proteus Inc.
1900 N. Dinuba Blvd,
Visalia, CA 93291

PH: 5597335423

msilva@proteusinc.org

October 1, 2020

REQUEST FOR PROPOSAL
Annual Budget Template Creation and Budget Training
Visalia, California

Article I. Introduction

Proteus Inc. requests that your company make a proposal for your services on budget template creation. The following proposal request will outline the project goals and detail the format you should submit your proposal. Please read the timeline carefully. In order for your proposal to be considered, your proposal must meet our deadlines included in the timeline under Section 2.02.

Section 1.01 Location and Sponsor

Template Creation and Review will occur through online meetings and online document reviews.

Section 1.02 Management

Armie Tolentino and Michelle Engel-Silva will be managing this project. They will be on location during the project.

Section 1.03 Contact Information

Please contact Michelle Engel-Silva for questions about the proposal submission details

Phone: (559)733-5423
E-mail: msilva@proteusinc.org

Please contact Armie Tolentino for questions about the project details:

Phone: (559) 733-5423
E-mail: armie@proteusinc.org

Article II. The Project

Section 2.01 Mission

The firm representative will work closely with the Chief Financial Officer in creating these templates to meet organizational and grant fiscal compliance policies.

Section 2.02 Project Specifications

The firm contracted to complete this project will review the current fiscal information, help create an annual budget template, and assist in budget training to clearly define expected revenue and expenses per grant and corporately. These duties may not be an all-encompassing list of activities performed in this scope of work, as more activities may be identified through fiscal analysis.

Section 2.03 Contractor Requirements

Should your proposal be accepted, we expect you to contribute the following to the project:

- Online editable budget template
- Budget training guideline.

Section 2.04 Timeline

In order to complete our mission, we have set the following timetable. This timetable is subject to change by the managers of this project.

Requests for Proposals Sent Out	October 01, 2020
Deadline for Proposal Letter of Intent and Bid due	October 09, 2020
Project Bid due	October 19, 2020
Project Start Date	October 26, 2020
Project Completion Date	November 19, 2020

Article III. The Proposal

Section 3.01 Summary of Proposal

(a) Expectations

Contracts will be awarded based on the information presented in the proposals received. We will award contracts based on the proposal expected to be the most beneficial to our project based on a variety of factors. Proteus Inc. reserves the right to award more than one contract, accept the lowest price offer, award contracts before the proposal deadline listed in the timeline, award contracts before all proposals are received, and refuse any contract without obligation to Proteus Inc. or to the company offering the proposal.

(b) Response Deadline

Please forward a letter of intent by October 9, 2020 if you intend to submit a proposal. Likewise, if you do not intend to make a proposal, please forward a no-bid letter by the same date.

(c) Proposal Deadline

All proposals must be submitted to Proteus Inc. by October 12, 2020 to be considered for their contribution to Budget template creation.

(d) Selection Criteria

All offers submitted will be considered based upon the materials provided in the proposal. Consideration will be given to performance projections as well as cost and staff requirements. Only those proposals submitted by the deadline above will be considered. The following criteria will be the primary considerations for selecting a proposal:

1. Submission of all proposals in the correct format by the stated deadline.
2. The perceived effectiveness of the proposal's solution for Proteus Inc.'s stated mission.
3. The perceived ability for the proposing company's ability to deliver their services set forth in their proposal.
4. The proposing company's past performance in delivering such services.

5. Availability of sufficient high quality personnel with the required skills for the specific approach proposed.
6. Overall cost of the proposal.

Proteus Inc. may suspend or discontinue proposals at any time without notice or obligation to the company that submitted the proposal.

(e) Proposal Format: Proteus Inc. suggests that you include the following information in your proposal. Proposals should adequately address the details of the proposed contract.

- (i) Contractor Summary*
- (ii) Capabilities and Methodology*
- (iii) Expected Results*
- (iv) Executives, Staffing, and Management*
- (v) Communication*
- (vi) Equipment*
- (vii) Expense Breakdown*
- (viii) Expense Summary*
- (ix) Licensing and Bonding*
- (x) Insurance*
- (xi) References*

Section 3.02 Proposal Details

(a) Contractor Summary

Include a brief history of your company including your past experience in dealing with similar projects. Also include the owners' names or those persons authorized to sign contracts for your business.

(b) Capabilities and Methodology

Detail your company's capabilities in delivering the requests in this proposal. You should use this section to outline specifically your proposed method for achieving your goal. This should include a detailed timeline of milestones for completing the project.

(c) Expected Results

Use this section to summarize the expected results of your methodology listed above. This should include a summary of your timeline for completing the project.

(d) Executives, Staffing, and Management

List the high level executives or officers in charge of completing the project and a summary of their background. You should also use this section to list the projected staffing and management necessities and their estimated cost. Specify how you will obtain the staff to complete the project.

(e) Communication

Explain how you intend to communicate between executives, management, and staff in addition to how you will communicate to the project manager to ensure the project stays on schedule.

(f) Equipment

Detail the equipment necessities as well as their estimated cost. If you will need additional services or space from Proteus Inc. you should list those requirements here with a brief explanation.

(g) Expense Breakdown

Build a detailed list of all expected expenses.

(h) Expense Summary

Give a brief summary of the total costs for your proposed contract. You may also include a brief explanation of the contributing costs to the total cost.

(i) Licensing and Bonding

If applicable, include the details of your licenses and bonds for the services you are proposing. If possible, enclose proof of your licenses and bonds.

(j) Insurance

If applicable, provide the details of insurance your company will provide for your staff and the project.

(k) References

Provide 1 reference for similar past projects encouraged but not required for submission.