WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT
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West Contra Costa Unified School District
Request for Proposals
Board of Education Forensic Accounting Investigation
August 12, 2015

I.   Introduction

The West Contra Costa Board of Education is seeking a firm with forensic accounting experience with school districts in the State of California that have bond programs to assist the Board in conducting a forensic accounting investigation of a complaint from a district employee about the operations, financial reporting and management of the District's bond-funded construction program. The Board plans to engage a firm that is independent of the West Contra Costa Unified School District and that has no prior work that could, in any way, be interpreted as a conflict of interest. The Board has established the Subcommittee for the Clay Investigation to oversee the forensic

   c. Bond Financial Audit Reports; and

   d. Bond Agreed-Upon Procedures (draft) for Fiscal Year 2014;

3. Provide the Board's Subcommittee for the Clay Investigation with a fraud risk assessment of the employee's complaint to identify highest risks of waste or improper expenditure and to provide guidance to the Board's Subcommittee in providing a scope for a forensic accounting investigation; and

4. Develop a scope of work, not-to-exceed contract amount and timeline for completion of the forensic accounting investigation of high priority items for approval by the Board's Subcommittee for the Clay Investigation.

In phase two, and depending upon the findings of the fraud risk assessment, the forensic accounting firm will complete the following:

1. Conduct a forensic accounting investigation of items in an approved scope of work and provide progress reports to the Board's Subcommittee for the Clay Investigation;

2. Deliver a preliminary report of findings and recommendations directly to the Board's Subcommittee for the Clay Investigation; and,

3. Make a final report of findings and recommendations to the Board of Education at a regularly scheduled meeting.

III. Submittal Requirements

One electronic copy and four paper copies of the proposal are due to the Chair of the Subcommittee no later than Friday, September 4, 2015, by 4:00 PM. The electronic copy can be either Microsoft Word or on a PDF file and transmitted via e-mail to lizblock@comcast.net and lisa.leblanc@wccusd.net. Four paper copies must be mailed or delivered to Lisa LeBlanc, Associate Superintendent, West Contra Costa Unified School District, 1400 Marina Way South, Richmond, CA 94804. **Please note: submitted proposals will be considered public documents.** The Subcommittee for the Clay Investigation reserves the right to reject any or all proposals, whether or not minimum qualifications are met and to modify, postpone or cancel the RFP without liability, obligation, or commitment to any party, firm, or organization. In addition, the Subcommittee reserves the right to request and obtain additional information from any accountant, or firm submitting a proposal. A proposal risks being rejected for any of the following reasons:

x Proposal is received after designated time / date;

x Proposal does not contain the required elements, exhibits, or is not organized in the required format;

x Proposal that is not fully responsive to the RFP;

x Proposal that contains excess or extraneous material not called for in the RFP.

Required Elements and Format

1. <u>Transmittal Letter</u>
  a. Addressed to Subcommittee Chair Liz Block, and
  b. Signed by the accountant submitting the proposal.

2. <u>Background Information</u>
  Provide a detailed résumé of each professional that will be dedicated to both phases of the engagement along with their respective title and hourly rate and pertinent background on the firm.

3.