

**Westshore Alliance RFP: Fractional Chief Financial Officer services for Westshore Alliance,
Westshore Special Services District, and Westshore District Foundation**

A. Introduction

The Westshore Alliance is a 501(c)(6), not-for-profit organization that serves businesses located in and doing business in the Westshore District of Tampa, Florida. The Westshore Alliance was founded in 1983 and represents nearly 400 businesses in the Tampa Bay region. Our mission is to continue the Westshore District's transformation into a premier mixed-use district and cultivate a thriving community for residents and businesses.

The Westshore Alliance serves as the master developer of the Westshore District through a Development of Regional Impact agreement with the City of Tampa and operates the Westshore Special Services District through an agreement with the City of Tampa.

The Westshore Alliance operates the Westshore District Foundation. It is a 501(c)(3) created to improve the Westshore District through public art and community programming.

B. Scope of Work

The Westshore Alliance is seeking written proposals from firms who are willing to provide fractional Chief Financial Officer services for the Westshore Alliance and associated accounts for the year starting January 1, 2025, for at least 1-year and up to a 3-year term.

The firm shall work with the Westshore Alliance staff, Officers, and Finance Committee on various aspects of financial reporting for the organization. These include, but are not limited to:

- Evaluate current financial systems, accounting policies, processes, and procedures.
- Provide monthly financial reports to the Westshore Alliance Officers, Finance Committee, Executive Committee, and Board of Directors.
- Support staff in annual filings with City of Tampa, State of Florida, and Internal Revenue Service.
- Work with auditors on annual reports and tax filings.
- Assist staff in developing annual budgets for the Westshore Alliance, Westshore Special Services District (City of Tampa non-ad valorem assessment), and Westshore District Foundation.

C. Current Operations

The Westshore Alliance has been in a growth period since 2021. In the last three years, we have restructured our membership pricing model, increased benefits for members, and added responsibilities to our portfolio of services for the Westshore District.

Our growth has created challenges. While we have over 10 years of clean audits, and a recent clean audit from the State of Florida, we recognize that there are improvements to be made in our processes and reporting to our Executive Committee and Board of Directors.

The organization has a volunteer CFO (a former Westshore Alliance president) who provides advice and insights to the Executive Director, Fiscal Assistant, and auditors. This RFP assumes a fractional CFO to take a role in the financial management and reporting of the Westshore Alliance, possibly up to 20 hours a month.

This RFP does not include auditing services. The selected respondent would be ineligible to serve as the auditing firm.

D. Submission Requirements

- a. Cover Page
 - i. Please include contact name, title, email address, name of your organization, address, and phone number.
- b. Company Information and Past Experience
 - i. Please include a summary of your work with small businesses (less than 10 employees), non-profit and not-for-profit organizations.
 - ii. Please include a summary of your work with local government grants, funding or reimbursements to non-profit and not-for-profit organizations.
- c. Services Description
 - i. Please indicate your core services and typical monthly schedule.
 - ii. How would you work with staff members and Westshore Alliance executives to allow for a seamless transition from our existing financial and accounting processes to a more efficient and effective system?
- d. Fee Proposal
 - i. Please include your proposed form of compensation, and additional services that may require compensation.
- e. Westshore Alliance membership
 - i. Please note current or previous Westshore Alliance membership, or if the company has never been a member of the Westshore Alliance.
 1. The selected respondent must be a member of the Westshore Alliance prior to signing an agreement for CFO services.
- f. References
 - i. Please include three references with a priority placed on small businesses (less than 10 employees), non-profit and not-for-profit organizations.
- g. Example Materials
 - i. Please include examples of your work with small businesses (less than 10 employees), non-profit and not-for-profit organizations.

E. Proposal Format

- a. Proposals shall be organized in the format listed above.

F. Submission of Proposals and Closing Time

- a. Proposals must be received by October 31, by 5:00 PM. Proposals must be in PDF format.
- b. Please submit proposals to:
Michael Maurino, Executive Director
Westshore Alliance
email: maurino@choosewestshore.com

G. Proposal Timeline and Evaluation

- a. RFP for CFO released October 1, 2024.
- b. Proposals and submissions must be received by October 31, 2024 at 5 PM
- c. CFO selection made by November 15, 2024 by 5 PM
- d. Anticipated contract award by December 15, 2024
- e. Commencement of contract by January 1, 2025
- f. Proposal Evaluation:
 - i. The Westshore Alliance will evaluate all proposals with the intention of retaining cost effective service relative to the scope of services provided by each respondent.
 - ii. Respondents may be asked to participate in follow-up calls prior to the selection of proposals.

H. Solicitation Terms

- a. Agreement
 - i. The Westshore Alliance intends to retain the awarded proposal for services when needed, and maintain the agreement, unless circumstances change, and it becomes not viable to maintain the agreement.
- b. Discretion
 - i. The Westshore Alliance, at its sole discretion, may choose not to issue any agreement with any respondent.
- c. Offers/Quotations
 - i. Quotes must be inclusive of all costs, including taxes and fees. Quotes must remain valid for up to 90 days after submission.
- d. Proposal Costs
 - i. There is no reimbursement for costs associated with these submissions.