

**Request for Quotation  
Financial Consulting Services**  
September 9, 2011  
Amended September 13, 2011

Capital IDEA seeks consulting services to support management staff and Board in the preparation and presentation of financial reports from management to Board. These services include:

1. Review of current financial reports given to Board members and suggestions for improvement.
2. Development of any new reports as needed.
3. Development of dashboard report of financial and other metrics.
4. Training of staff in preparation and analysis of dashboard report.
5. Review of current accounting software and procedures to suggest efficiency improvements.
6. Review and discussion of reports prior to Audit and Finance Committee held monthly or bi-monthly.
7. Discussion of reports with management staff prior to staff presentation to Committee.

The potential exists that Capital IDEA sister organizations in San Antonio, the Rio Grande Valley, and El Paso would be interested in procuring the services of the consultant retained to assist in the efficiency improvements within their own organizations. Those costs would be borne by the sister organizations independent of Capital IDEA. Please indicate your willingness to discuss similar consulting relationships with them.

Please provide names and phone numbers for three professional references for whom you have provided comparable services.

You may secure a copy of the financial reports currently given to Committee Members and their suggestions for new reports from Steve Jackobs at [sjackobs@capitalidea.org](mailto:sjackobs@capitalidea.org).

You may request further information from Steve Jackobs by email. If you wish to receive copies of information provided in response to bidders' requests, please notify by email Steve Jackobs by Wednesday, September 14 at 4 p.m.

We request that you email a written Quotation to [sjackobs@capitalidea.org](mailto:sjackobs@capitalidea.org) no later than Friday, September 16 at 4 p.m. The Quotation should include hourly rate(s) and estimate of time for each of the seven enumerated items.