



City of St. George State of Louisiana

REQUEST FOR QUALIFICATIONS AND PROPOSALS FOR PROFESSIONAL AUDITING SERVICES

1.0 Introduction

The City of St. George seeks qualifications and proposals from CPAs for auditing services including agreed upon procedures, if required.

The selected CPA or CPA firm will be responsible for providing all audit reports required by the Louisiana Legislative Auditor for municipalities in a timely manner. The term of the engagement will be for three fiscal years.

Respondents shall submit Statements of Qualifications together with proposals including all fees and costs.

St. George reserves the right to modify or discontinue this Request for Qualifications and Proposals (“RFQ&P”) at any time without any obligation to any Respondent. All costs of preparation of proposals shall be borne by Respondents. St. George will not reimburse any expenses incurred by any Respondent prior to the term of the contract.

Respondents must deliver an original and seven copies of the Statement of Qualifications and Proposals and an electronic copy on a flash drive in PDF on or before **May 15, 2025, at 2:00 PM CST** in a sealed plain envelope marked as follows:

City of St. George
ATTN: RFQ&P-AUDITING
14100 Airline Highway
St. George, Louisiana 70817

2.0 Background

The City of St. George is a municipality with an area of approximately 60 square miles situated in the southeast corner of East Baton Rouge Parish. St. George is governed by the Lawrason Act, LA. R.S. 33:381, *et seq.* St. George was incorporated by an election held on October 12, 2019. The 2024-2025 fiscal year audit will be the first audit for the City of St. George.

St. George’s Mayor, Chief of Police and five councilmembers were appointed in June of 2024. St. George’s elected Mayor will be responsible for administration and its elected seven-member Council will be responsible for legislative functions including appropriation of funding for services.

The elected Chief of Police and East Baton Rouge Parish Sheriff’s Office provide law enforcement. St. George currently leases space from the St. George Fire Protection District.

St. George intends to select a contractor to provide administrative and development services to be delivered to approximately 80,000 residents and businesses through a public-private partnership beginning on July 1, 2025. St. George seeks to provide services (and expand as deemed necessary) through one or more public-private partnership(s) as determined to be efficient, reliable, and cost effective.

St. George will not be responsible for Animal Control, Fire Protection, Garbage Collection, Law Enforcement, Sewer Maintenance, Recreational Facilities and Parks maintained by the Baton Rouge Recreation Commission, Parish Libraries, Emergency Medical Services, Council on Aging, Mosquito Abatement, Mental Health Center, EBR Parish Schools or Sales and Use Tax Collection as those services will be provided by other agencies.

St. George will operate on a fiscal year beginning on July 1st and ending on June 30th. During the 2024-2025 fiscal year no funding was received by St. George until October of 2024. Revenues for the 2024-2025 fiscal year consist mostly of occupational licensing taxes and fees for building inspections and development applications. In March of 2025, St. George authorized the issuance of \$20,000,000 in revenue anticipation notes for operating expenses. The anticipated revenues for the 2025-2026 fiscal year and subsequent fiscal years is anticipated to exceed \$50,000,000 primarily from the 2% sales and use tax, occupational license tax and fees collected for services.

For 2024-2025 fiscal year, no employees accrued leave or qualified for benefits. No pension liability or other post-employment liability reporting will be required.

3.0 Schedule of Events – Any revisions to the schedule will be posted at www.stgeorgela.gov. St. George reserves the right to change the Schedule of Events or issue addenda to this RFQ&P. Respondents are responsible for checking the website for any changes.

Period	Activity	Date	Calendar Days
Issuance of RFQ&P	Notice of RFQ&P in Official Journal and on City's website	04/15/2025	Day 1
RFQ&P Question Deadline	Respondents can submit questions through email	4/30/2025 @ 4:00 PM	Day 15
Deadline for City to Respond to Questions and Issue Any Final Addendum (if required)	City responds to questions	5/5/2025	Day 20
Statements of Qualifications and Proposals Due	Respondents submit Statements of Qualifications and Proposals	5/15/2025 @ 2PM	Day 30
Ranking of Respondents and Schedule Interviews		5/16/2025	Day 31
Completion of Interviews and Recommendation to Council		5/20/2025	Day 35
Contract Period Begins		7/1/2025	

4.0 Questions and Communications

To ensure a fair and objective evaluation of all Statements of Qualifications and Proposals, Respondents SHALL NOT initiate contact or communications with any appointed or elected official of the City of St. George regarding this RFQ&P until after award of contract or until this RFQ&P has been cancelled.

Questions concerning any portion of the RFQ&P shall be submitted via email **RFP@stgeorgela.gov** no later than **April 30, 2025, at 4:00 PM CST**. All inquiries together with responses thereto will be posted on St. George's website, **<https://stgeorgela.gov>**, on or before **May 5, 2025**.

5.0 Procurement Process Objectives

St. George desires to engage a CPA or CPA firm approved by the Louisiana Legislative Auditor to provide auditing services applicable to municipalities in a timely manner.

6.0 Rights Reserved

St. George reserves the right to waive administrative informalities in any proposal. Written or oral discussions may be conducted with any or all Respondents to determine the proposal in the best interest of St. George. St. George reserves the right to make an award based on the proposals without further discussion of the proposals.

St. George reserves the right to communicate with one or more Respondents regarding a Best and Final Offer (BAFO). The Respondents will be provided with a list of specific items to be addressed in the BAFO with instructions for submittal. The BAFO may be used to clarify the scope of work or to obtain the most cost-effective pricing available from the Respondents.

All proposals are considered valid until an award is made. An award is anticipated to be made prior to June 30, 2025.

7.0 No Conflict of Interest

Respondent shall not have a real or perceived conflict of interest with City of St. George or its appointed or elected officials. A conflict of interest includes:

- Respondent is owned by an immediate family member of an appointed or elected official of the City of St. George.
- Respondent or an owner of Respondent has a business relationship with an appointed or elected official of the City of St. George.
- Respondent employs any immediate family member of an elected or appointed official of the City of St. George which would present a conflict under the Louisiana Code of Governmental Ethics.

8.0 Format for Responses

Submissions must be bound and printed on 8.5" x 11" paper. Additionally, an electronic copy on a Flash Drive in PDF shall be submitted.

The statement of Qualifications shall be organized in the following manner:

A. Cover Letter Executive Summary — Identification of Respondent

- Respondent's name, address, and telephone number.
- Name of a single key contact person and contact information including telephone numbers and email address.
- Identify how long Respondent has been in business of auditing in Louisiana.
- List any governmental or regulatory sanctions respondent has been subject to in the last five years including but not limited to the State Board of Certified Public Accountants of Louisiana, the Louisiana Board of Ethics, the NLRB or EEOC.

B. Qualifications and Experience

- Describe Respondent's relevant experience with projects having a similar scope of services listing experience with auditing governmental entities of similar size.
- For each project listed as relevant experience within the past five years, provide a listing in table format of project references including project name, client contact and phone number, brief description of project, annual contract value, and number of employees.
- Identify any projects within the past five years where Respondent or any subsidiary or related entity has been terminated prior to the end of the contract term. Please provide an explanation of the reasons for termination.

C. Resumes

- Provide resumes of **key individuals** who will be responsible for providing auditing services and describe their roles and relevant experience.
- Describe how Respondent would respond to a situation where any key individuals assigned to the engagement would be replaced.

D. List of Litigation/Arbitration Disputes and Matters

- List the caption of all lawsuits or arbitration in which you have been a named party from January 1, 2020, through present.
- With respect to each lawsuit or arbitration please provide the following information, the jurisdiction/court in which the matter was/is pending, the nature of the dispute (factual summary and primary issues) and where applicable how and in whose favor the matter was concluded or resolved.

E. Insurance

- Respondent must provide a certificate of coverage for professional liability, general liability and workers compensation insurance.

F. Cost

- Respondent shall provide a maximum cost for the engagement by fiscal year.