



Dutchess County Workforce Investment Board

“Building Partnerships for Workforce Solutions”

Request for Price Quotes

Dutchess County Workforce Investment Board (DCWIB) is issuing this Request for Quotations (RFQ) to obtain pricing and availability for professional services to review, correct, and stabilize its existing QuickBooks (online version) accounting system. The intent of this RFQ is to select a qualified Contractor that offers the best value based on price, demonstrated qualifications, and ability to meet the requirements described herein. Servicing commencing May 2026.

Issue Date

February 23, 2026

Deadline for Submission

March 20, 2026

Award Notification Date

On or about April 15, 2026

Award will be made to the responsive and responsible Contractor whose quotation is determined to provide the best overall value to the Organization, considering price and the evaluation criteria outlined above.

Funding

Budget should be reasonable and necessary.

Contact

Dutchess County Workforce Investment Board
3 Neptune Ave
Poughkeepsie, NY 12601
Phone: (845) 463-0517
E-Mail: taylor@dcwib.org

The proposals most advantageous to DCWIB in terms of quality and cost will be recommended for funding.

This Request for Price Quotes does not commit the Dutchess County Workforce Investment Board to award a contract. The DCWIB reserves the right to accept or reject any or all proposals, in whole or in part, for just cause. The DCWIB reserves the right to waive informalities and minor irregularities in proposals received. All awards are contingent upon availability of funds.

3 Neptune Road Poughkeepsie, NY 12601
Telephone (845) 463-0517 Fax (845) 463-0100 www.dcwib.org

*The programs provided by this agency are partially funded by moneys received from the County of Dutchess
EOE/P auxiliary aids and services are available upon request to individuals with disabilities*



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The DCWIB reserves the right to cancel or modify this request for proposals or the scope of funding to any extent necessary to ensure compliance with state and/or federal guidelines.

SCOPE OF SERVICES

General Requirements

The Contractor shall provide all labor, expertise, supervision, and tools necessary to complete the services described below. All work shall be performed in accordance with generally accepted accounting principles (GAAP) and standard accounting best practices.

Time Range

- 1-1-2020 to present

Average Transactions per Year

- Approximately 600 per year
- All transactions are entered into the system (they may be misclassified)

Reporting

- Contractor reports to DCWIB Deputy Director
- Any changes that need to be made will be approved by the Deputy Director
- Initially, contractor will have read-only rights
- Once recommendations are made and accepted, additional access will be provided
- Goal is that each year stands on its own

System Assessment

The Contractor shall:

- Review the Organization’s existing QuickBooks file (Online or Desktop, as applicable)
- Evaluate system configuration and Chart of Accounts
- Identify data integrity issues, including but not limited to:
 - Misclassified, duplicate, or missing transactions

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- Unreconciled bank, credit card, and loan accounts
 - Accounts Receivable and Accounts Payable discrepancies
 - Payroll and sales tax inconsistencies (if applicable)
 - Provide a written summary of findings and recommended corrective actions
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Data Cleanup and Corrections

The Contractor shall:

- Correct transaction classifications
 - Resolve duplicate or erroneous entries
 - Reconcile applicable balance sheet accounts for agreed-upon periods
 - Correct Accounts Receivable and Accounts Payable balances
 - Resolve undeposited funds and clearing accounts
 - Adjust opening balances as required, with full documentation
 - Record and document all adjusting journal entries
-

System Structure and Configuration

The Contractor shall:

- Reorganize and optimize the Chart of Accounts
 - Review and correct system settings impacting reporting
 - Ensure consistent application of customers, vendors, classes, and locations, where applicable
-

Historical Reconciliation and Reporting

The Contractor shall:

- Reconcile historical accounting periods as specified
- Produce corrected financial reports, including:
 - Balance Sheet

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- Statement of Revenues and Expenditures (Profit and Loss)
 - Ensure all reports reflect reconciled and supportable balances
-

Documentation and Closeout

The Contractor shall:

- Provide a detailed summary of all corrections and adjustments
 - Deliver reconciliation and adjustment documentation
 - Identify root causes of prior issues
 - Provide written recommendations for improved internal controls and ongoing bookkeeping practices
-

DELIVERABLES

The Contractor shall deliver, at a minimum:

- A cleaned and reconciled QuickBooks accounting system
 - Accurate financial statements for agreed-upon periods
 - Written assessment and cleanup summary
 - Adjustment and reconciliation support
 - Final project closeout documentation
-

CONTRACTOR MINIMUM QUALIFICATIONS

Quotations will only be considered from Contractors that meet the following minimum qualifications:

- Active QuickBooks ProAdvisor certification or equivalent
 - Demonstrated experience performing QuickBooks cleanup or remediation services
 - Experience with organizations of similar size and complexity
 - Ability to provide references upon request
-

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QUOTATION SUBMISSION REQUIREMENTS

Contractors shall submit a quotation that includes:

- Fixed-price cost proposal (preferred) or hourly rates with a not-to-exceed estimate
- Estimated project timeline and completion date
- Assumptions, dependencies, and exclusions
- Description of required access and Organization responsibilities
- Confirmation of ability to meet the Scope of Services

EVALUATION CRITERIA

Quotations will be evaluated using the following criteria:

Cost (40%)

- Total proposed price
- Clarity and completeness of pricing
- Cost reasonableness and value

Qualifications and Experience (30%)

- Demonstrated experience with QuickBooks cleanup engagements
- Relevant certifications and professional credentials
- Experience with public sector or similar organizations

Technical Approach and Responsiveness (20%)

- Understanding of the Scope of Services
- Proposed methodology and timeline
- Identification of risks and assumptions

References and Past Performance (10%)

- Quality and relevance of references
- Record of completing similar projects on time and within budget

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Contact

This is a formal RFQ process and we would like to receive price quotes from interested parties by COB March 20, 2026 . Questions and comments can be sent to taylor@dcwib.org.

Discrimination

It is the policy of the DCWIB not to discriminate in the award of contracts against any qualified bidder on the grounds of race, creed, color, national origin, age, disability, religion, marital status, sex or sexual orientation. All contracts with the DCWIB shall include provisions requiring contractors to comply with such policy in their hiring of employees and selection of subcontractors, vendors and suppliers.

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