



**SUNSET EMPIRE TRANSPORTATION DISTRICT**  
**900 Marine Drive, Astoria, OR 97103**

## **Proposal Submission**

The Sunset Empire Transportation District (SETD) is soliciting proposals for the provision of a budget officer during our current budget preparation cycle. The objective of this engagement is to maintain compliant financial reporting and support the district in meeting statutory obligations related to budgeting. The contract shall serve as the SETD's Board of Commissioners appointed Budget Officer. Contract staff is preferred to have a Certified Public Accountant (CPA) credential but not required.

The Request for Proposals (RFP) shall be publicly advertised and remain open for a period of ten (10) calendar days from the date of issuance. Proposals must be received by the deadline specified in this RFP to be considered responsive. Late submissions will not be accepted.

Proposals shall not exceed ten (10) pages in length, excluding resumes and required forms, unless otherwise specified. Pricing information shall be included with the proposal.

Questions must be submitted by March 24, 2026, and responses will be posted on our website by March 26, 2026. <https://nwconnector.org/setd/>

Publication date shall be: March 19, 2026

Proposal submittal deadline shall be: 5 p.m. on April 2, 2026

Proposals shall be emailed to: Executive Director David Carr  
Email: [david@ridethebus.org](mailto:david@ridethebus.org)

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## **Evaluation Criteria**

Proposals will be evaluated by an evaluation committee based on the following criteria and weighting:

- **Contractor Qualifications (50%)**  
Evaluation will consider the proposer's relevant experience, technical expertise, past performance, and demonstrated ability to successfully perform the scope of work.
- **Timeliness (25%)**  
Evaluation will consider the proposer's ability to meet project deadlines, including the proposed schedule, staffing plan, and overall approach to timely completion of the scope of work. Time is of the essence and proposers unable to complete tasks by June 30, 2026, will not be considered.
- **Cost (25%)**

Evaluation will consider the proposer's total cost for completion of the project and overall value to the Agency.

Each proposal will be scored according to the criteria above. Based on the scoring, proposers will be ranked in order from highest to lowest scoring proposer.

The Agency may request clarifications, conduct interviews, or request additional information from proposers as needed to complete the evaluation.

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## **Award**

The contract will be awarded to the responsible proposer whose proposal is determined to be the most advantageous to the Agency, based on the evaluation criteria described above.

The Agency reserves the right to reject any or all proposals, waive minor informalities, and cancel this solicitation if it is in the best interest of the Agency.

## **SUNSET EMPIRE TRANSPORTATION DISTRICT PERSONAL SERVICES AGREEMENT**

This Personal Services Agreement ("Agreement") is made and entered into this \_\_\_ day of \_\_\_\_\_, 20\_\_\_, by and between Sunset Empire Transportation District ("District"), a special district organized under Oregon law, and \_\_\_\_\_ ("Contractor").

### **1. Scope of Services**

Contractor shall perform the services described in Exhibit A (Scope of Work) in a timely and professional manner, exercising the degree of care, skill, and diligence customary for similar services.

### **2. Compensation**

District shall compensate Contractor as set forth in Exhibit B (Compensation). Unless otherwise stated, compensation is on a fixed-fee basis with a not-to-exceed amount of \$\_\_\_\_\_. Contractor shall submit invoice upon the completion of the project with sufficient detail to support charges. Payment is Net 30 days after District's acceptance of fully completed services and receipt of a proper invoice.

### **3. Budget Meeting Schedule**

Contractor shall attend budget meetings as per schedule in Exhibit C (Schedule.)

### **4. Term**

This Agreement shall commence on \_\_\_\_\_, 20\_\_ and terminate on June 30, 2026, unless earlier terminated as provided herein. Extensions require written amendment. Contractor shall attend budget meetings as per schedule in Exhibit C (Schedule.)

### **5. Changes**

District may request changes to scope, schedule, or deliverables. Changes must be documented in a written amendment signed by both parties.

## **6. Independent Contractor**

Contractor is an independent contractor and not an employee of the District. Contractor is responsible for all taxes, withholdings, insurance, and benefits.

## **7. Insurance**

Contractor shall maintain, at its own expense, during the term of this Agreement:

- Commercial General Liability: \$1,000,000 per occurrence / \$2,000,000 aggregate.
- Professional Liability (Errors & Omissions): \$1,000,000 per claim.
- Workers' Compensation as required by ORS Chapter 656 (unless exempt).

Certificates of insurance shall be provided to the District upon request.

## **8. Indemnification**

To the extent permitted by law, Contractor shall defend, indemnify, and hold harmless the District, its officers, directors, and employees from third-party claims, damages, or liabilities arising out of Contractor's negligent acts, errors, or omissions in performance of this Agreement. District's liability is limited by the Oregon Tort Claims Act and Oregon Constitution.

## **9. Mandatory Oregon Public Contracting Requirements (ORS 279B)**

Contractor shall:

- 1) Pay promptly all persons providing labor or materials (ORS 279B.220).
- 2) Make required medical care & workers' comp payments (ORS 279B.230).
- 3) Comply with hours of labor & notices (ORS 279B.235).
- 4) Certify compliance with Oregon tax laws (ORS 279B.220(4), ORS 305.620).
- 5) Recycle yard waste if applicable (ORS 279B.225).
- 6) Comply with conflict mineral prohibition (ORS 279B.242).

These statutory provisions are incorporated by reference and binding.

## **10. Records & Public Records Law**

Contractor shall maintain complete records of services performed. Records are subject to inspection by the District and may be subject to disclosure under Oregon Public Records Law (ORS 192.311–.478).

## **11. Confidentiality**

Contractor shall not disclose District non-public information except as necessary to perform the services.

## **12. Termination**

For Convenience: District may terminate at any time upon 10 days' written notice; Contractor shall be paid for services satisfactorily performed to the date of termination.

For Cause: District may terminate immediately upon Contractor's material breach that is not cured within 10 days after written notice.

## **13. Assignment**

No assignment or subcontracting without prior written District approval.

## **14. Governing Law; Venue**

This Agreement shall be governed by Oregon law. Venue lies in the Circuit Court for Clatsop County, Oregon.

**15. Entire Agreement**

This Agreement, including Exhibits A, B and C, is the complete and exclusive statement of the agreement between the parties. Amendments must be in writing signed by both parties.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date first written above.

<b>Sunset Empire Transportation District</b> By: _____ Name: David Carr Title: Executive Director Date: _____	<b>Contractor</b> By: _____ Name: _____ Title: _____ Date: _____
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**Exhibit A – Scope of Work**

**STATEMENT OF WORK (SOW)**

**Budget Officer**

**CPA Preferred – Not Required**

**Client:** Sunset Empire Transportation District (SETD)

**Project Title:** Budget Officer

**Effective Date:** April \_\_, 2026

**1. Purpose**

This Statement of Work establishes the terms under which budget officer services will be provided to Sunset Empire Transportation District (SETD) during the budget preparation cycle.

The objective of this engagement is to maintain compliant financial reporting and support the district in meeting statutory obligations related to budgeting.

The contractor will serve as the Sunset Empire Transportation District Board of Commissioners appointed Budget Officer. Contract staff is preferred to have Certified Public Accountant (CPA) credentials but not required.

The contractor will act strictly in an independent advisory capacity and will not function as a District employee.

**2. Authority and Legal Framework**

Services provided under this engagement shall comply with applicable Oregon statutes governing special districts and public financial administration, including but not limited to:

- Oregon Local Budget Law (ORS Chapter 294)
- Municipal Audit Law (ORS Chapter 297)
- Oregon Public Records Law (ORS Chapter 192)

All financial advisory services shall be consistent with:

- Generally Accepted Accounting Principles (GAAP)
- Governmental Accounting Standards Board (GASB) standards

The contractor shall not:

- authorize expenditures
- move District funds
- execute bank transfers
- sign checks or financial instruments
- commit the district to financial obligations

### **3. Scope of Services**

#### **Budget Officer**

The contractor shall provide services associated with the Budget Officer function under Oregon Local Budget Law (ORS 294).

Services shall include:

- Reviewing and leading the development of the district's budget
- Leading preparation of budget documentation as needed
- Assisting with budget adjustment documentation as needed
- Advising District leadership on compliance with Budget Law
- Assisting with preparation of financial information for the Budget Committee
- Financial forecasting for budget preparation purposes
- Reviewing previous audits conducted within the last three years to inform budget work
- Other Budget related duties as required by Oregon State Law

### **4. Contractor Qualifications**

The contractor assigned under this agreement should have professional experience in:

- Public sector accounting or municipal finance with a preference for Transit experience (but not required)
- Government budgeting or special district financial administration

- Financial reporting and audit preparation
- Compliance with Oregon Local Budget Law (ORS 294) and Municipal Audit Law (ORS 297)

Certified Public Accountant (CPA) designation is preferred but not required.

Professionals with demonstrated experience in government or special district finance, public budgeting, or municipal financial administration may also qualify.

## **5. Deliverables**

Deliverables under this engagement shall include:

- Budget message
- Budget preparation calendar and timeline
- Outline of budget process
- Staff Budget Committee meetings
- Attend Budget Committee meetings in person, unless there's a previous agreement with the Board of Commissioners
- Attend Board budget hearing in person or virtually
- Prepare proposed budget
- Assist with publishing statutory budget notices
- As needed, assist with the modification of the budget, appropriations, and categorization of taxes including development of a budget adoption resolution
- Submit adopted budget resolution to county tax official

## **6. Term of Engagement**

The anticipated duration of this engagement is date of engagement until June 30, 2026, unless extended by mutual written agreement. The engagement may conclude earlier upon adoption of the Fiscal Year 2026-27 budget or mutual agreement between the parties.

## **7. Compensation**

Compensation will be based on a project basis. Invoices include a summary of services performed and will be paid within 30 days of receipt.

## **8. Coordination and Communication**

District Contact  
Executive Director - David Carr  
david@ridethebus.org  
Sunset Empire Transportation District

Contractor Contact  
Assigned Contractor / Budget Officer

The Executive Director retains final authority over financial decisions and approvals.

**9. Confidentiality**

All information obtained during this engagement shall be treated as confidential except where disclosure is required under Oregon Public Records Law (ORS 192).

**10. Professional Responsibility**

The contractor will perform services consistent with:

- Generally Accepted Accounting Principles (GAAP)
- Governmental Accounting Standards Board (GASB) standards
- Professional standards applicable to financial contractors or CPAs where applicable
- Oregon Local Budget Law (ORS 294), Municipal Audit Law (ORS 297) and Oregon Public Records Law (ORS Chapter 192)

The contractor does not assume responsibility for final financial decisions made by the District.

**11. Termination**

Either party may terminate this agreement with 10 business days written notice.

Outstanding invoices for services rendered prior to termination remain payable.

**12. Acceptance**

**Sunset Empire Transportation District**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_

**Contractor**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Exhibit B – Compensation**

Project Title: Sunset Empire Transportation District Budget Officer

Contractor: \_\_\_\_\_

Date: \_\_\_\_\_

1. Compensation Method

Fixed Fee \$ \_\_\_\_\_ (Lump sum for all services)

2. Invoicing

- Contractor shall submit invoices upon the full completion of the project
- Invoices must reference District PO/Agreement # and detail hours, rates tasks and expenses
- District shall pay Net 30 days after acceptance of services and receipt of proper invoice

**Exhibit C – Schedule**

Schedule for in-person Budget Committee meetings (subject to change):

- April 16, 12-2 p.m. | Budget Committee Training
- April 30, 1-4 p.m. | Budget Meeting #1
- May 15, 1:30-4:30 p.m. | Budget Meeting #2
- June 12, 9-11 a.m. | Budget Meeting #3 (if needed)