**REQUEST FOR PROPOSAL (RFP)**

**[NAME OF ORGANIZATION]**

**Fiscal Year 2016**

**Background of the Organization**

The [NAME OF ORGANIZATION] ([ACRONYM]) is a statewide, non-profit professional organization, classified by the Internal Revenue Service as a [LIST CLASSIFICATION HERE, I.E., 501(C)(3), (6), ETC.]. It also has [INSERT NUMBER] separate organizations under the [NAME OF ORGANIZATION] umbrella: [LIST ORGANIZATIONS HERE]. [NAME OF ORGANIZATION] uses [SOFTWARE NAME] accounting software. Its fiscal year ends [INSERT DATE HERE].

The [NAME OF ORGANIZATION] has audits performed on a [LIST FREQUENCY] basis and the most recent audit was completed in [YEAR].

You can find background on the [NAME OF ORGANIZATION] at [WEBSITE ADDRESS]. For more information, please contact [NAME], [TITLE], [MAILING ADDRESS]. Telephone: [TELEPHONE NUMBER], or email [EMAIL ADDRESS].

We expect the books to be closed by [DATE]. You must complete the audit and provide bound, dated final reports by [DATE]. You must include time for a review of the draft report by the [NAME OF ORGANIZATION] Secretary/Treasurer. You are to present the completed Audit report to the [NAME OF ORGANIZATION] Executive Committee [OR BOARD OF DIRECTORS].

**Scope of Work**

Audit performed on the [NAME OF ORGANIZATION] and [LIST OTHER ORGANIZATIONS] financial statements for the [TERM] ended [DATE]. The audit will be performed in accordance with auditing standards generally accepted in the United States of America. The auditor will issue an opinion on the financial statements and provide applicable reports on internal control and other matters, including the issuance of a management letter with any comments for improvements in internal control or financial operations.

**Proposal Format**

Your proposal should be concisely prepared, limited to no more than 15 pages, excluding resumes. Your proposal must include the following information:

1. Cover letter, including an overview of the proposal and contact names for further information.
2. Proposed approach to the engagement including staffing, hours, and a proposed timeline.
3. Summary of the firm’s experience in similar engagements, including references for two recent engagements with non-profit organizations.
4. Resumes for the key personnel detailing their experience in non-profit organizations such as the [NAME OF ORGANIZATION].
5. Copy of any disciplinary actions undertaken against the firm in the last five years.
6. Breakdown of the fees associated with the audit.

Submit three sets of the proposal, each in a sealed envelope by [SPECIFIC TIME], on [DATE] to:

 [NAME OF ORGANIZATION]

 [ADDRESS]

 [CITY/STATE/ZIP]

Or email to [EMAIL ADDRESS].

**Award Process**

The [NAME OF ORGANIZATION] will award the audit to the firm whose proposal that reflects the best value to the [NAME OF ORGANIZATION] taking into consideration the firm’s experience, proposed approach, qualifications of key personnel, and proposed fixed fee. The [NAME OF ORGANIZATION] reserves the right to reject any and all proposals received and/or to request clarification of the proposal.

**Terms for Bid Contract**

1. Bid should include firm’s non-profit and/or association audit experience.
2. Three references must be supplied along with bid.
3. Initial audit shall cover Fiscal Year (FY) [YEAR].
4. Bids will be accepted until [TIME], [DATE].
5. Bids will be reviewed by the Executive Committee and recommendations for acceptance will be submitted for vote during the next [TYPE OF MEETING: BOARD OR EXECUTIVE COMMITTEE] meeting on [DATE].
6. Successful bidder will be notified by official letter, may begin audit on or after [DATE], and must be complete audit by [DATE].
7. Successful bidder shall present audit findings directly to the Executive Committee [OR BOARD OF DIRECTORS] no later than [DATE].
8. Bid price shall include costs performed for initial financial audit of FY [YEAR].