



Request for Proposals (RFP) for Independent Financial Auditing and 990 Services

Big Brothers Big Sisters of the Big Bend, Inc (BBBS BB) invites individual financial professionals and firms to submit a proposal for contracted Financial Auditing and 990 services.

Proposal documents must be submitted in PDF format via email to molly@bbbsbigbend.org and cc: officemanager@bbbsbigbend.org by April 10, 2026 @ 5pm. All candidates/vendors will be informed of a decision no later than Friday April 24th @ 5pm.

Send proposals to: Molly Lord, CEO
Big Brothers Big Sisters of the Big Bend, Inc
molly@bbbsbigbend.org
and cc: officemanager@bbbsbigbend.org
Subject Line: RFP for Audit/990 Services

Contact Information for Questions Diane Dawson, Director of Operations
Big Brothers Big Sisters of the Big Bend, Inc
565 E. Tennessee Street
Tallahassee, FL 32308
OfficeManager@bbbsbigbend.org
(850-386-6002)

ORGANIZATIONAL OVERVIEW

Big Brothers Big Sisters of the Big Bend, Inc is a 501(c)(3) public charity, that is committed to our mission of providing children facing adversity with strong and enduring, professionally supported one-to-one relationships that change their lives for the better, forever. Our agency has beneficial interest in assets held by Community Foundation of North Florida, Inc, and a 5500 plan, as well as both state and federal grants. Our annual revenues are just under 1 million dollars per year, and the agency employs between 7 – 10 full time staff, as well as temporary employees. The organization is match-based, big/mentors and littles/mentees. The organization has a June 30th fiscal year-end.

SUMMARY OF REQUEST

BBBS BB seeks to establish, through this RFP, a contract for independent financial and compliance auditing services by qualified firms of certified public accountants to perform audits and 990 services. The anticipated term of this agreement will be five (5) years commencing with the fiscal year ending June 30, 2026.

SCOPE OF WORK

Purpose:

The scope of work will include an annual, independent financial audit of BBBS BB for a term of five fiscal years. This includes complete financial and compliance auditing and 990 services for FY 2025-2026, 2026-2027, 2027-2028, 2028-2029, 2029-2030.

Each audit shall be conducted in accordance with GAAS and Government Auditing Standards of the Comptroller General of the United States of America.

Deliverables:

- Auditing and 990 services:
 - o Vendor will complete an audit report by certified public accountant to include:
 - Audit findings on internal control and compliance, management letter, schedule of findings and questions costs.
 - o Management letter to include:
 - Statement describing the results of the auditor's determination.
 - Statement that the auditor applied financial condition assessments.
 - o Supplemental information as applicable such as budgetary comparison information.
 - o Preparation of financial statements, depreciation schedule and the IRS Form 990.
- Vendor will present the findings and the aforementioned audit and 990 to the BBBS BB Board at their December meeting for review and discussion.

EVALUATION CRITERIA

BBBS BB will consider the following factors when evaluating the proposals. Factors are not listed in order of importance.

- Qualifications of firm/independent financial professional
- Qualifications and experience of the staff to be assigned to our account
- Ability to meet the Scope of Work
- Ability to maintain staff continuity as much as possible

- Cost of services
- Services beyond the Scope of Work
- References

MINIMUM QUALIFICATIONS

A Respondent must demonstrate at least five years of experience providing financial and compliance auditing services by a firm of certified public accountants licensed in good standing in the State of Florida. A Respondent may satisfy this requirement via the experience of its proposed key personnel, even if those members performed the service for another company. Responses not satisfying this minimum requirement will be deemed non-responsive and will not be evaluated.

PROPOSAL REQUIREMENTS

GENERAL INFORMATION

Please include a cover sheet with the following information:

- Name of contractor/firm
- Contact person/Title
- Mailing address
- Telephone number
- Email address
- Website

We will provide financial statements and our most recent form 990 upon request.

ORGANIZATIONAL OVERVIEW AND QUALIFICATIONS

In 500 words or less, please provide the following descriptions:

- Firm/professional history and scope of practice of firm.
 - o Brief synopsis of professional experience
 - o Any related professional designations and how they will directly benefit the work for our organization.
 - o Organizations they serve as a volunteer or board member, including years of service.
 - o Any personal relevance or meaning to our organization's mission
- Explain how contractor/firm is a good fit with our organization, detailing experience with other non-profit clients of a similar size and scope.
- Provide details on staff turnover in the past three years, and commitment to continuity.

STATEMENT OF WORK AND TIMELINE

In 1000 words or less, please provide the following descriptions:

- Proposal to fulfill the Scope of Work as noted above.
- Outline key steps and persons responsible, level of effort, and supervision required.
- Your preferences and expectations when working with clients.
- Describe how your firm will approach the transition process, if we move from our current firm.
- Based on our Financial Statements and Form 990 and your firm's experience in the nonprofit sector, provide three suggestions you would make to BBBS BB.

DISCLOSURES AND AFFIRMATION STATEMENT

Include the executed original of the completed RFP Form A, Service Requirement: Disclosures and Affirmation Statement.

PROJECT MANAGEMENT AND FEES

Please describe the following:

- Set forth your fee proposal for the included services, with whatever guarantees can be given regarding increases in future years.

REFERENCES

Please provide the following:

- A list of non-profit clients (name only) for whom the contractor/firm has provided similar contracted services.
- Contact information for three (3) specific professional references including at least two (2) current non-profit clients, for whom the contractor/firm provided similar services.

ADDITIONAL TERMS

During the evaluation process, BBBS BB reserves the right to request additional information or clarifications from proposers and the right to reject any or all proposals. The cost of developing proposals are entirely the responsibility of the individual or vendor and shall not be charged in any manner to BBBS BB. This includes, but is not limited to, the direct cost of vendor personnel assigned to prepare vendor's response to the RFP and any out-of-pocket expense (including, but not limited to travel accommodation, supplies, etc.) incurred by the individual or vendor in preparing the response to the proposal. Please note that all materials submitted in response to this RFP become the property of BBBS BB upon delivery and shall be appended to any formal documentation, which would further define or expand the contractual relationship

between BBBS BB and the contracted vendor. Each applicant, as an express condition for the BBBS BB consideration of such proposal, agrees that the contents of every other proposal submitted by other applicants with respect to this RFP are confidential, proprietary and trade secret information in all technical ears, and waives any right to access such proposals during the RFP process. No submissions or supporting documentation will be returned to the submitting applicant. Neither party shall be liable for disclosures that are required by law.

FORM A on next page.

FORM A – DISCLOSURES AND AFFIRMATION STATEMENT

The undersigned certifies the following with respect to the Respondent and its response; if an unqualified certification is not accurate, attach explanation to this form:

Respondent certifies it will maintain throughout the contract term any licenses required pursuant to the laws of the State of Florida in current and active standing.

The selection of the Respondent will not result in any current or potential conflict of interest with BBBS BB. Alternately, should any potential or existing conflict be known by the Respondent, specify the party with which the conflict exists or might arise, the nature of the conflict, and whether the Respondent would step aside or resign from the engagement creating the conflict, including each of the items below.

Whether any officer, director, employee, or agent is also a current or former employee of BBBS BB, or any of the members of the Board, and if there are any factors, financial or otherwise, known to them which may give rise to a conflict of interest between you and BBBS BB and its employees, or have the effect of impacting your ability to meet your responsibilities, duties and obligations to BBBS BB, as set forth in the RFP, and whether the Respondent would step aside or resign from the engagement creating the conflict. Disclose the name of any BBBS BB board member or staff who owns, directly or indirectly, and interest of five percent (5%) or more of your company or any of its branches or affiliates.

Any arrangement with any individual or entity with respect to the sharing of any compensation, fees, or profit received from or in relation to providing financial and compliance auditing services for BBBS BB. If applicable, provide a copy of any contract relating to the arrangement and describe in detail the nature of the arrangement and the method of computing compensation.

Will the Respondent pay or be obligated to pay any firm or an individual who is not a full-time employee of the Respondent if the Respondent is awarded a Contract under this RFP? If so, identify the individual or firm, provide specific information relating to compensation paid or to be paid, and provide a copy of any written contract relating to such arrangement.

The Response is made without prior understanding, agreement, or connection with any other person or entity submitting a response for the same services, and the response is in all respects fair and without collusion or fraud. The Response is not made in connection with any competing Respondent submitting a separate response to the RFP and is in all respects fair and without collusion or fraud. The Respondent did not directly or indirectly induce any party to submit a false or sham Response or to refrain from responding. The Respondent did not participate in the RFP development process, had no knowledge of the specific contents of the RFP prior to its issuance, and did not involve any employee of BBBS BB directly or indirectly in the Response preparation.

The Response is that of the Respondent and has not been copied or obtained from any other person or entity responding to any other competitive solicitation whether in Florida or elsewhere either in the past or present.

The Respondent has not been convicted of or entered a plea of nolo contendere to fraud within a period of five years of this date.

The Respondent and the agents, officers, principals, and professional employees thereof have not and will not participate in any communication prohibited in this RFP.

I hereby certify that all information provided in this Response is true and correct, that I am authorized to sign this Response for the Respondent, and that the Respondent is in compliance with all requirements of the RFP.

Authorized Signature

Name and Title

Date

Respondent

