

Re: Request for Proposal (RFP) for IRS Form 990

Our not-for-profit social service organization, Boys & Girls Clubs of Laredo, is requesting proposals for the preparation and filing of our organization's IRS Form (990) from CPA firms who have extensive experience in providing nonprofit tax services to not-for-profit associations. If you feel you fit that description, we invite you to submit a proposal.

The following information regarding the organization and financial status should help you prepare your proposal.

1. OUR ORGANIZATION

1.1 Background and History:

Since its dedication on July 4, 1946, Boys & Girls Clubs of Laredo have been the helping hand that has made the difference in the lives of thousands of young people.

Our Mission is to inspire and enable all young people, especially those from disadvantaged circumstances, to realize their full potential as productive, responsible and caring citizens.

Our Vision is to provide a safe place for children to learn and grow, to provide ongoing relationships with caring adult professionals and life-enhancing programs and character development experiences, as well as hope and opportunity for the children in our community.

1.2 Current financial information:

Our nonprofit serves over 25,000 members each year with funding from grants, contracts, and fees. We receive government funding. Our annual revenue has ranged between \$1,800,000.00 and \$2,000,000.00 over the past 2 years.

2. AUDIT TIMING

Our organization utilizes a fiscal year, which ends December 31st. We anticipate that we would be prepared for the nonprofit audit to begin by June 1, 2025, and would expect the delivery of financial statements and management letter by August 31, 2025.

3. SERVICES TO BE PROVIDED

Our organization requests a bid from your firm to:

1. Prepare a management letter.
2. Be available to answer questions that may arise throughout the entire year(s).
3. Complete Tax Returns (990)

If you decide to submit a proposal, we will make available to you:

1. The current financial statements
2. Current trial balance
3. The latest tax return
4. Chart of accounts
5. Organization chart

4. PROPOSAL SPECIFICATONS

Please provide the following information in your proposal. Since we will be comparing the qualifications of a number of firms, please provide the information in the order requested.

4.1 Firm philosophy in providing services to organization:

1. Provide a brief description of your firm.
2. Describe what engagements your firm currently has in our industry. If partners or other employees serve in an advisory capacity, please list such positions.
3. Describe your firm's basic approach to performing a [nonprofit audit](#) and the resulting advantages, which will accrue to our organization. *You should identify how a job is planned, scheduled, partner and manager commitment, quality control, and other areas in which you feel you are unique.*

4.2 Other services available through your firm:

4.3 Scheduling and staffing of engagement:

1. Identify the engagement team which would be performing our nonprofit audit and include a resume of the qualifications and experience for partners, managers, and senior staff.
2. Indicate the expected timing and completion of the nonprofit audit and the expected delivery of the financial statements and management letter (this should directly correlate with our needs)
3. Indicate what assistance is required by our accounting staff to be provided to the engagement team.

4.4 Fees:

1. Provide information regarding your audit fee for our nonprofit audit. State whether or not expenses are included in your fee structure.
2. Describe whether and how you bill for overruns. State how your organization can reduce any overruns and how we can be assured of no "surprise" billings.
3. Explain your firm's availability and billing for advice and counsel during the year.

4.5 Other proposal information:

5. Proposal Deadline:

The deadline for receipt of your proposal submission is April 15, 2025. No proposals received after that date will be considered. All proposal submissions will be responded to once a decision has been made.

If you have any questions or would like further clarification of any aspect of this request for bid, please contact us at bidopportunities@bgclaredo.com or 956-242-4975.

We appreciate your consideration of our proposal.

Sincerely,
Boys & Girls Clubs of Laredo