



## **Request for Proposal (RFP)**

### **Tax Preparation and Audit Services Redwood City Education Foundation**

**RFP No.: RCEF-2025-001**

#### **1. Overview**

The Redwood City Education Foundation (RCEF) invites qualified accounting firms to submit proposals to provide tax preparation and audit services. RCEF is a nonprofit organization committed to supporting and enhancing educational opportunities for students in the Redwood City School District.

This RFP seeks to secure a firm with demonstrated experience in nonprofit accounting, compliance, and financial reporting.

- **RFP Released:** March 7, 2025
- **Proposal Submission Deadline:** April 4, 2025, by 5:00 p.m.
- **Selection Notification:** May 2, 2025
- **Service Commencement:** August 1, 2025

#### **2. Scope of Work**

The selected firm will provide the following services:

##### **2.1 Annual Tax Preparation:**

- Prepare and file the organization's federal and state tax returns, including IRS Form 990 and related schedules.
- Ensure compliance with all applicable tax regulations and nonprofit reporting standards.

##### **2.2 Annual Financial Audit:**

- Conduct an independent audit of RCEF's financial statements in accordance with Generally Accepted Auditing Standards (GAAS).

- Provide an opinion on the fair presentation of financial statements.
- Identify any areas for improvement or control weaknesses and provide recommendations.

### **2.3 Compliance and Consultation:**

- Assist in ensuring compliance with nonprofit financial and regulatory requirements.
- Provide periodic consultation on financial, tax, and compliance matters as needed.

## **3. Proposal Requirements**

Firms submitting proposals must include the following information:

### **3.1 Organizational Overview**

- Brief history and description of the firm.
- Experience with nonprofit clients.
- Details of staff who would be assigned to RCEF, including qualifications and experience.

### **3.2 Approach and Methodology**

- Description of the firm's approach to tax preparation and auditing services.
- Overview of the process, timeline, and deliverables for the annual audit and tax preparation.

### **3.3 Fees**

- Detailed breakdown of costs for tax preparation, auditing, and any additional services.
- Estimated total annual fee and payment schedule.

### **3.4 References**

- Provide at least three references from nonprofit clients with similar needs.

## **4. Proposal Submission Instructions**

### **4.1 Submission Deadline:**

All proposals must be submitted by April 4, 2025, by 5:00 p.m.

### **4.2 Submission Method:**

Email a PDF copy of the proposal to [treasurer@rcef.org](mailto:treasurer@rcef.org) with the subject line: "Proposal for Tax Preparation and Audit Services – [Firm Name]."

### **4.3 Contact for Questions:**

Questions regarding this RFP should be directed to Michael Bolander, Treasurer – [treasurer@rcef.org](mailto:treasurer@rcef.org).

## **5. Evaluation Criteria**

Proposals will be evaluated based on:

- Experience with nonprofit or similar organizations.
- Technical expertise and qualifications of assigned staff.
- Cost-effectiveness of the proposal.
- References and past performance.
- Demonstrated understanding of RCEF's mission and financial needs.

## **6. Contract Award**

### **6.1 Award Procedure**

Contract negotiations are neither an offer nor guarantee that a contract will be executed. A contract award, if any is made, will be to the responsive, responsible proposer offering the overall best value to the RCEF for the services and goods described in this solicitation, or as applicable, for a specific portion of the services and goods described. Any agreement reached will be memorialized in a formal agreement executed by the appropriate authority.

### **6.2 Commencement of Performance**

After all parties have signed the agreement, the RCEF will notify the contractor and performance may proceed. Prior to execution of the agreement by the RCEF, no RCEF employee may authorize work under the agreement. Any work performed prior to the full execution of the Agreement may not be compensated.

## **7. Additional Information**

### **7.1 Errors, Omissions, and Inquiries Regarding the RFP**

Proposers are responsible for reviewing all portions of this RFP. Proposers are to notify the RCEF if the proposer discovers any ambiguity, discrepancy, omission, or apparent error in the RFP. Such notification should be made promptly after discovery, but in no event later than five business days prior to the deadline for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

Inquiries regarding the RFP should be sent to [treasurer@rcef.org](mailto:treasurer@rcef.org).

### **7.2 Objections to RFP Terms**

Should a proposer object on any ground to any provision or legal requirement set forth in this RFP, the proposer must, not more than ten calendar days after the RFP is issued, provide written notice to the RCEF via email at [info@rcef.org](mailto:info@rcef.org) setting forth with specific grounds for the objection.

### **7.3 Addenda**

The RCEF may cancel, revise, or reissue this RFP, in whole or in part, for any reason. Revisions will be posted as Addenda on the RCEF website at [www.rcef.org](http://www.rcef.org). No other revision of this RFP is valid. Proposers shall be responsible for ensuring that their proposals reflect any and all Addenda issued by the RCEF prior to the proposal due date regardless of when a proposal is submitted. Therefore, the RCEF recommends that proposers consult the website frequently, including shortly before the proposal due date, to confirm that all Addenda have been downloaded.

### **7.4 Term of Proposal**

Submission of a proposal signifies that the proposed services and prices are valid for the duration of the proposed agreement term and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

### **7.5 Revision or Withdrawal of Proposal**

A proposer may revise a proposal on the proposer's own initiative at any time before the deadline for submission of proposals. The proposer must submit the revised proposal in the same manner as the original on or before the proposal due date.

A proposer may withdraw a proposal at any time before the deadline for submission of proposals. After that time, whether or not a new RFP is issued for the same subject matter, withdrawal of a proposal may preclude the proposer from participating in the procurement as a proposer or subcontractor, except that an original equipment manufacturer may participate indirectly through a reseller.

### **7.6 Errors and Omissions in Proposal**

The RCEF will not be liable for any errors in proposals. Proposals may be rejected as unresponsive if they are incomplete, are missing pages or information, or cannot be opened for any reason. The RCEF may waive minor irregularities, but such waiver will not modify any of the remaining RFP requirements.

### **7.7 No Commitment**

Neither submission of a proposal nor the RCEF's receipt of proposal materials confers any right to the proposer nor any obligation on the RCEF. This RFP does not commit the RCEF to award a contract.

### **7.8 Financial Responsibility**

The RCEF shall have no financial responsibility for any costs incurred by a firm in responding to this RFP or participating in any presentations or negotiations.

## **8. Public Record**

### **8.1 General**

- All proposals, protests, and information submitted in response to this solicitation will become the property of the RCEF and will be considered public records. As such, they may be subject to public review.
- Any contract arising from this RFP will be a public record.
- The RCEF is not seeking proprietary information and will not assert any privileges that may exist on behalf of the proposer.
- Submission of any materials in response to this RFP constitutes:
  - Consent to the RCEF's release of such materials under the Public Records Act without notice to the person or entity submitting the materials; and
  - Waiver of all claims against the RCEF and/or its officers, agents, or employees that the RCEF has violated a proposer's right to privacy, disclosed trade secrets, or caused any damage by allowing the proposal or materials to be inspected; and
  - Agreement to indemnify and hold harmless the RCEF for release of such information under the Public Records Act; and
  - Acknowledgement that the RCEF will not assert any privileges that may exist on behalf of the person or entity submitting the materials.

**Thank you for your interest in supporting the Redwood City Education Foundation. We look forward to your proposal.**