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## REQUEST FOR PROPOSAL (RFP): INDEPENDENT FINANCIAL AUDIT AND TAX PREPARATION SERVICES

**Issued by:** Public Law Center  
601 Civic Center Drive West  
Santa Ana, CA 92701

**Date Issued:** January 10, 2025

**Proposal Submission Deadline:** February 10, 2025 by 5pm (PT)

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### Introduction

The Public Law Center (PLC) is a 501(c)(3) nonprofit legal services organization dedicated to providing access to justice for low-income and vulnerable residents of Orange County, California. We are seeking proposals from qualified accounting firms to provide the following services:

1. Conduct an independent financial audit for the fiscal year ending December 31, 2024;
2. Conduct a Single Audit in accordance with Federal Law Audit Requirements for grant recipients; and
3. Prepare and file the federal Form 990 and applicable state tax returns.

### Scope of Services

#### 1. Independent Financial Audit

The selected firm will:

- Conduct an audit of PLC's financial statements in accordance with generally accepted auditing standards (GAAS) and applicable nonprofit accounting standards.
- Conduct a Single Audit in accordance with Federal Law Audit Requirements for grant recipients.
- Review internal controls and provide recommendations for improvements.
- Present the audit findings and financial statements to PLC's Audit Committee and/or Board of Directors.
- Deliver a signed auditor's opinion and all required reports **by May 2, 2025**.

#### 2. Tax Preparation

The selected firm will:

- Prepare and file PLC's federal Form 990 and all applicable California state tax returns.
- Advise on compliance with federal and state tax laws for nonprofits.
- Provide a draft of all tax returns for PLC's review before submission.
- File the tax returns no later than **May 15, 2025 (unless an extension is granted)**.

### Proposal Requirements

Firms responding to this RFP should include the following in their proposals:

1. **Firm Background**

- Overview of the firm, including size, location, and areas of specialization.
- Experience working with nonprofit organizations, specifically 501(c)(3) entities.
- 2. **Staff Qualifications**
  - Bios of key personnel assigned to PLC's account, including their experience with nonprofit audits and tax preparation.
- 3. **Approach and Timeline**
  - Description of the audit process and tax preparation approach.
  - Proposed timeline for completing the audit and tax filings.
- 4. **References**
  - Contact information for at least three nonprofit clients for whom the firm has provided similar services.
- 5. **Cost Proposal**
  - Detailed fee structure for the audit and tax preparation services.
  - Any additional fees for out-of-scope services.
- 6. **Additional Information**
  - Any other information the firm considers relevant to its proposal.

## **Evaluation Criteria**

Proposals will be evaluated based on the following criteria:

- Relevant experience and qualifications.
- Understanding of nonprofit accounting and tax requirements.
- Proposed approach and timeline.
- Cost and value of services.
- References and client feedback.

## **Submission Instructions**

Please submit your proposal electronically in PDF format to: CFO Jeff Bolton, [jbolton@publiclawcenter.org](mailto:jbolton@publiclawcenter.org), and CEO/Executive Director Monica Glicken, [mglicken@publiclawcenter.org](mailto:mglicken@publiclawcenter.org).

Proposals must be received no later than February 10, 2025. Late submissions will not be considered unless an extension is requested and granted beforehand.

## **Questions**

Questions regarding this RFP may be submitted in writing to Jeff Bolton, [jbolton@publiclawcenter.org](mailto:jbolton@publiclawcenter.org) by January 27, 2025. Responses will be provided to all potential bidders by February 3, 2025.

## **Terms and Conditions**



1. PLC reserves the right to reject any and all proposals, accept any proposal deemed to be in its best interest, and waive any irregularities in the proposal process.
  2. All costs incurred in the preparation of a proposal are the responsibility of the proposing firm.
  3. PLC may request additional information or conduct interviews with finalists before making a selection.
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**We look forward to your proposal and thank you for your interest in working with the Public Law Center.**