



**Request for Proposal #24-01
Professional Auditing & Tax Services for**

Please mark all sealed proposal submissions with the following information:

RFP #24-01
June 14, 2024, at 2PM ET

If Vendor is not submitting a solicitation response, Vendor should respond by returning this solicitation document and marking it "NO RESPONSE."

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1.0 GENERAL INFORMATION, SCOPE OF SERVICES, AND INSTRUCTIONS TO PROPOSERS

OneJax is requesting proposals from qualified Certified Public Accounting firms (Proposer) to provide audit, tax return preparation services, for the fiscal year ending June 30, 2024, and four years thereafter.

OneJax is a newly reestablished independent 501(c)(3) nonprofit organization that promotes inclusivity among diverse groups as the foundation for a strong community. We work to increase respect and improve relationships among people who reflect the wide variety of religious, ethnic, racial, and cultural groups that are represented in our community. The records and staff - will be accessible. Financial statements are prepared on the accrual basis of accounting in accordance with generally accepted accounting principles (GAAP). The financial records are processed on QuickBooks a fund accounting, on fiscal year basis with the fiscal year running from July 1 to June 30.

The activities regarding year-end closing are normally completed by the end of July.

The initial term of any agreement(s) resulting from this Request for Proposal (RFP) will be for five (5) years through June 30, 2029. OneJax will have the option to renew for one (1) additional two (2) year period upon mutual written consent of both parties to the Agreement; renewals are not automatic. The Successful Vendor's performance is expected to begin on June 30, 2024.

Scope of Services

OneJax is soliciting the services of qualified firms of independent certified public accountants to audit their financial statements. In addition, OneJax is soliciting services to prepare the required Federal and State income tax returns for the fiscal year ending June 30, 2024, and four years thereafter. The audit shall be performed in accordance with generally accepted auditing standards as set forth by the American Institute of Certified Public Accountants and the standards for financial audits set forth in the U.S. General Accounting Office's Government Auditing Standards.

The Board of Directors of OneJax requires preparation of the following reports related to OneJax's audit:

- Preparation and audit of Financial Statements for OneJax
- Preparation of the IRS Forms 990 and 990T and state tax returns, including related schedules and extensions, if necessary.

Other required reports related to OneJax's audit:

- As required by any external funding agency, if necessary

Please note that draft audited financial statements for OneJax are due to OneJax by October 1.

Following completion of the audit of the fiscal year's financial statements, the auditor shall issue:
A report on the fair presentation of the financial statements in conformity with generally accepted accounting principles.

1. A report on the internal control structure based on the auditor's understanding of the control

- structure and assessment of control risk.
- 2. A report on compliance with applicable laws and regulations.
- 3. A report on supplementary information in relation to the basic financial statements taken as a whole.
- 4. A letter detailing significant opportunities to improve management practices, if applicable.

To assist the selected Firm, OneJax will provide the basic information required for the audit and will be responsible for the accuracy and completeness of that information. OneJax does expect advice regarding appropriate accounting principles and their application.

It is anticipated that the selected Firm will be available during the year for consultation on any tax or accounting issue that may arise as well as preparation of the appropriate tax returns.

A representative of the Firm is expected to attend the Finance Committee meeting and present the audit plan and the results of its audit.

1.1 Calendar of Events

Unless otherwise revised by an addendum to this solicitation, the dates and times by which stated actions will be taken or completed are listed below. If OneJax determines, in its sole discretion, that it is necessary to change any of these dates and times it will issue an addendum to this competitive solicitation which will be posted on the website. All times listed are Eastern Time (ET).

May 15, 2024	Solicitation released and posted to website.
May 29, 2024	All questions/inquiries from vendors regarding the solicitation should be submitted via email no later than 5:00 PM to authorized OneJax Representatives jacey@onejax.org and
June 5, 2024	OneJax will respond to inquiries and requests for clarifications by posting an addendum on the website.
June 14, 2024	Deadline to receive proposals from Vendors is 2:00 PM.
June 2024	Onsite Presentations
June 2024	Contract Award

OneJax will post notice of changes to any of the above dates and/or times and will provide advance notice of evaluation committee meetings related to this solicitation by posting the information on OneJax website at www.onejax.org

Vendor is solely responsible for checking the Website periodically in order to verify whether any

changes have been made to the Calendar, or whether any additional meetings have been scheduled. OneJax reserves the sole discretion over the conduct of any meetings and the extent, if any; those attending may participate in such meetings.

1.2 Proposal Preparation Instructions

1.2.1 Vendor's Understanding of the RFP

In responding to this RFP, the Vendor accepts full responsibility to understand the RFP in its entirety and in detail, including making any inquiries to OneJax as necessary to gain such understanding. Questions regarding this RFP should be submitted no later than May 29, 2024.

1.2.2 OneJax Provides Information in Good Faith without Liability

All information provided by OneJax in this RFP is offered in good faith. Individual items are subject to change at any time. OneJax makes no certification that any item is without error. OneJax is not responsible or liable for use of any information or for any claims based on the information.

1.2.3 Verbal Communication

Vendors are not entitled to rely upon communications from OneJax except as provided by OneJax in writing.

1.2.4 Questions, Communications and Inquiries between OneJax and Vendors

All Vendor inquiries, questions and requests for clarification related to this RFP shall be directed, in writing, to Jacey Kelley at Jacey@onejax.org and

1.2.5 Addenda and OneJax's Response to Communications from Vendor

OneJax will make a good-faith effort to provide a written response to each question or request for clarification that requires an addendum within the time frame set forth in Section 1.1.

OneJax has no obligation to furnish addenda by any other means than posting to its Website.

OneJax will not respond to any questions/requests for clarification that require an addendum after the date identified in Section 1.1.

1.2.6 Pricing Proposal

Vendors shall indicate pricing in the appropriate spaces and/or areas provided in this RFP. Vendors shall ensure that any departure from this condition results in an offer that is clearly cross-referenced to the applicable sections within this RFP. For any material departure from this condition, Vendors shall provide clear and unambiguous explanations how the departure relates in detail to the applicable sections within this RFP. If the Vendor responds with an "All or None" proposal, it shall be clearly and unambiguously marked as such.

OneJax may presume and hold as the Vendor's offer all pricing and/or revenue offerings,

whether stated as amounts or percentages, and/or whether or not offered on an all-or-none basis, if not specified by the Vendor. OneJax may accept or reject, in part or entirely, the Vendor's pricing and/or revenue offerings when such offerings are not on an all-or-none basis. OneJax prohibits the changing of pricing and/or revenue proposals after the initial RFP opening date and time. Unless otherwise specifically proposed by the Vendor, OneJax reserves the right to hold such pricing and/or revenue proposal as effective for the entire intended contract term. OneJax may prescribe the manner and method by which pricing and/or revenue offerings shall be communicated in the Vendor's proposal. OneJax may reject any proposal in which the pricing and/or revenue offering does not conform to such prescribed manner and method.

1.2.7 Revisions to the RFP

OneJax may revise any part of this RFP for any reason by issuing addenda. OneJax will communicate additional information and addenda to this RFP by posting them on the Website.

Vendors are responsible for the information contained in such addenda. OneJax is under no obligation to communicate such addenda to Vendors other than posting to the Website. OneJax may determine whether an addendum will be considered as part of this RFP and/or as part of any contract resulting therefrom. OneJax shall reject Vendors' responses to addenda if such responses are received after the RFP opening date and time.

1.2.8 Required Signature

OneJax may reject any Vendor's response if it is not fully completed and signed with legal authority where indicated.

1.2.9 Proposal Organization

Response Format

- Please submit a copy of your proposal via email to onejax@onejax.org . Response must include the RFP number and title, company name and due date/time.
- The vendor's response must include the information and required submittals described.
- Questions and requests for information may not be rearranged, regrouped or divided in any way.
- All information and required submittals requested must included in your written response.
- Information submitted that is not requested by OneJax may be supplemental and not subject to evaluation by the committee members.

Failure to provide required information may cause your response to be rejected without further evaluation.

Format

- **Cover Page**

- **Table of Contents**
- **Brief Overview**

A one-page summary highlighting the major points in the Vendor's proposal.
- **Firm Qualifications**
 - a) Describe the firm, including the number of offices, number of partners, and professionals.
 - b) Indicate for the firm the number and type of not-for-profit and government clients served and the types of engagements.
 - c) Describe the firm's experience with audits of not-for-profit entities.
 - d) If the firm is the subject of any litigation or professional disciplinary action that might adversely affect its ability to conduct a multi-year audit engagement, describe the litigation or disciplinary action.
- **Staffing**
 - a) Identify the firm's office that will staff the OneJax engagement and describe the number of partners and professionals in the office and the not-for-profit and government practice for the office.
 - b) Identify the partner-in-charge and other professional staff that will be assigned to the OneJax audit. For each person named, provide a brief biographical background with a list of not-for-profit and government clients served that includes the type of engagement and the capacity served.
 - c) Discuss commitments you will make to staff continuity, including your staff turnover experience in the last three years. Address in the response what assurances can be given that staff assigned will have had experience at comparable organizations and have fund accounting competence.
 - d) Describe the firm's policy of staff and management rotation.
 - e) What are your policies on staff education, as they would relate to maintaining competence in not-for-profit and governmental audits?
 - f) The deadline for submitting the audited financial statements and tax forms to OneJax is October 1st. Provide the anticipated timeline of the audit for the financial statement report and any other requirements as outlined in the scope of work. Include the planning phase of the audit, schedule of fieldwork testing for interim and year-end procedures, concurring partner review periods, etc. Address the firm's planned use of internal audit and how the firm's staff will interact and rely on the work performed by internal audit.
 - g) Describe procedures to be utilized that will monitor the progress of work for periodic evaluation. Discuss the communication process to be used by the firm to discuss issues with management and the Finance Committee.
- **Approach to this Engagement**
 - a) Describe the overall approach that the firm would take in the audit engagement including the firm's use of technology. Include a proposed schedule indicating the approximate times for completion of the various phases of the audit. Indicate the number of audit hours that will be budgeted for these engagements (please provide separate budgeted hours).

- b) Please identify recent accounting standards affecting institutionally related foundations by FASB, GASB, and the AICPA. Please indicate positions taken by your firm on these issues. In addition, please identify emerging problematic areas that you predict must be addressed in future years. Indicate the level of assistance you would provide to use regarding these matters.
- c) What type of publications does the firm issue on a regular basis that would be of interest to our organization? Please provide copies as a part of your response. Describe briefly training courses, computer software, internal control checklists, or other forms of assistance that could be available, along with costs of these services. (Any materials submitted will be retained by OneJax unless otherwise noted. If any materials are to be considered confidential, they must be marked as such.)
- **Management Letter**
 - a) Describe the process the firm will take to produce a meaningful management letter, if applicable.
 - b) Include a copy of your firm's most recent peer review report, the related letter of comments, and the firm's response to the letter of comments.
- **References**
 - a) Provide three recent not-for-profit or government audit clients that can be contacted as references. Include the client's name, address, telephone number, and the name of the contact person.
 - b) Provide copies of prior audit reports
- **Approach to Tax Engagement and Staffing**
 - a) Identify the partner-in-charge and other professional staff that will be assigned to the OneJax tax review. For each person named, provide a brief biographical background with a list of not-for-profit clients served and the capacity served related to tax work.
 - b) Please list a timeline for review of the 990 and 990T once OneJax's staff provides the necessary supporting work papers and information.
 - c) Describe the overall approach that the firm would take in the tax review and include the firm's technology and any resources provided to OneJax to complete the tax forms.
 - d) Discuss the manager and partner communication with staff during the tax review, specifically relating to any proposed changes. Include the expected communication method and the allowed time that management will be provided to respond.
- **Fee Quote**
 - a) Include a quotation of fees for the proposed audit and tax return preparation services. The proposal should include a fee schedule for the next five years. Further, provide an indication of the estimated level of expenses. Be specific on the types of recurring services included in the basic fee, such as responding to periodic technical questions, as well as explaining the firm policy on separate billings for inquiries. Provide fee schedules that would apply for such special services.
 - b) Explain the firm's policy for distinguishing between billable consulting services and nonchargeable services.

- **Certification Forms: Please include electronically signed documents from section 4.0**

1.2.10 Proposal Costs

OneJax is not liable in any manner or to any extent for any cost or expense incurred by any Vendor in the preparation, submission, presentation, or any other action connected with proposing or otherwise responding to this RFP. Such exemption from liability applies whether such costs are incurred directly by the Vendor or indirectly through the Vendor's agents, employees, assigns or others, whether related or not, to the Vendor.

1.2.11 Withdrawal of RFP

Vendors may withdraw their proposals prior to award.

2.00 Evaluation Process and Award

2.1 Contractual Intent/Right to Terminate and Recommence RFP Process

OneJax intends to contract with one vendor whose proposal is in the best interests of OneJax. However, OneJax may terminate this RFP process at any time up to Notice of Intended Decision, without prior notice, and without liability of any kind or amount. Further, OneJax reserves the right to commence one or more subsequent RFP processes seeking the same or equivalent products or services covered hereunder.

2.2 Effective Period of Proposals

Under this RFP, OneJax shall hold that Vendors' responses to this RFP shall remain in effect for a period of 90 days following the opening date to allow time for evaluation, approval and award of the contract. Any Vendor who does not agree to this condition shall specifically communicate in its proposal such disagreement to OneJax along with any proposed alternatives. This OneJax may accept or reject such proposed alternatives without further notification or explanation.

2.3 Errors and Omissions in Vendor's Proposals

OneJax may accept or reject any Vendor's proposal, in part or in its entirety, if such proposal contains errors, omissions or other problematic information. OneJax may decide upon the materiality of such errors, omissions or other problematic information.

2.4 Determination of, and Information Concerning, Vendor's Qualifications

OneJax reserves the right to determine whether a Vendor has the ability, capacity and resources necessary to fully perform any contract resulting from this RFP. OneJax may request from Vendors information it deems necessary to evaluate such Vendors' qualifications and capacities to deliver the products and/or services sought hereunder. OneJax may reject any Vendor's proposal for which such information has been requested but which the Vendor has

not provided. Such information may include, but is not limited to:

- Financial resources
- Personnel resources
- Physical resources
- Internal financial, operating, quality assurance and other similar controls and policies
- Resumes of key executives, officers and other personnel pertinent to the requirements of the RFP
- Customer / Client references
- Disclosure of complaints or pending actions, legal or otherwise, against the Vendor.

2.5 Apparently Conflicting Information Obtained by Vendor

OneJax is under no obligation whatsoever to honor or observe any information that may conflict, or appear to conflict, with any provision herein, regardless of whether such information be obtained from any office, agent or employee of OneJax. Such information shall not affect the Vendor's risks or obligations under an agreement resulting from this RFP.

2.6 Rejection of Vendor Counter-offers, Stipulations and Other Exceptions

Any Vendor exception, stipulation, counter-offer, requirement, and/or other alternative term or condition shall be considered rejected unless specifically accepted, in writing, by OneJax and thereafter incorporated into any contract resulting from this RFP.

2.7 Method of Award

The Award shall be made to the responsible Vendor whose proposal is determined to be the most advantageous to OneJax. OneJax reserves the right to negotiate all parts of this proposal.

2.8 Selection and Additional Information

Although OneJax reserves the right to request additional information or clarification on any matter included in the proposal, it also reserves the right to select the most responsive Vendor(s) without further discussion or prior notice. OneJax presumes that any proposal is a best-and-final offer.

2.9 Pre-Award Presentations

OneJax reserves the right to require presentations. Such presentations may include discussions relating to proprietary information, ability to perform and specific provisions of a vendor's response. Presentations are not public meetings.

3.00 Termination

3.1 Convenience

OneJax reserves the right to terminate the Agreement, in whole or part, at any time when in the best interests of OneJax without penalty or cause. Upon receipt of the written notice, the Successful Vendor shall immediately stop all work as directed in the notice, notify all subcontractors of the effective date of the termination and minimize all further costs to OneJax. In the event of termination under this provision, all documents, data and reports

prepared by the Successful Vendor under the Agreement shall become the property of and delivered to OneJax. The Successful Vendor shall be entitled to receive just and equitable compensation for work in progress, work completed, and materials accepted before the effective date of termination. Such compensation shall be the Successful Vendor's sole remedy against OneJax in the event of termination under this provision. Successful Vendor acknowledges and agrees that receipt of just and equitable compensation for work in progress, work completed, and materials accepted before the effective date of termination by OneJax for convenience constitutes fair and adequate consideration and mutuality of obligation to support the Agreement.

3.2 Default

OneJax reserves the right to terminate the Agreement, in whole or in part, due to (a) the failure of the Successful Vendor to comply with any term or condition of the Agreement including, without limitation, any breach of a warranty or representation or (b) the failure of the Successful Vendor to make reasonably satisfactory progress in performing the Agreement. OneJax shall provide written notice of the termination stating grounds for the termination to the Successful Vendor. Upon termination under this provision, all goods, materials, documents, data and reports prepared by the Successful Vendor under the Agreement shall become the property of, and be delivered to, OneJax on demand. OneJax may, upon termination of the Agreement, procure, on terms and in the manner that it deems appropriate, materials or services to replace those under the Agreement. The Successful Vendor shall be liable to OneJax for any excess costs incurred by OneJax in re-procuring the materials or services, together with reasonable attorney's fees and costs associated with the collection of such excess costs.

3.3 Gratuities

OneJax may, by written notice to the Successful Vendor, cancel the Agreement if it is discovered by OneJax that gratuities in the form of entertainment, gifts, loans, rewards, promises of future employment, favors or services were offered, or given, by the Successful Vendor or any agent or representative of the Successful Vendor, to any officer or employee of OneJax with a view toward securing favorable treatment with respect to the awarding or amending or the making of any determinations with respect to the performing of such Agreement. In the event the Agreement is canceled by OneJax pursuant to this provision, OneJax shall be entitled, in addition to any other rights and remedies, to recover or withhold the amount of the cost incurred by Successful Vendor in providing such gratuities.

3.4 Insolvency

OneJax shall have the right to terminate the Agreement at any time in the event Successful Vendor files a petition in bankruptcy; or is adjudicated bankrupt; or if a petition in bankruptcy is filed against Successful Vendor and not discharged within 30 days; or if Successful Vendor becomes insolvent or makes an assignment for the benefit of its creditors or an arrangement pursuant to any bankruptcy law; or if a receiver is appointed for Successful Vendor or its business.

3.5 Stop Work Order

OneJax may at any time, by written order to the Successful Vendor, require the Successful Vendor to stop all or any part of the work called for by the Agreement for a period of 90 days after the order is delivered to the Successful Vendor and for any further period to which the parties may agree. The order shall be specifically identified as a Stop Work Order issued under

this provision. Upon receipt of the order, the Successful Vendor shall immediately comply with its terms and take all reasonable steps to minimize the incidence of costs allocable to the work covered by the order during the period of work stoppage. If a Stop Work Order issued under this provision is canceled or the period of the order or any extension expires, the Successful Vendor shall resume work. OneJax shall make an equitable adjustment in the delivery schedule or Agreement price, or both, and the Agreement shall be amended in writing accordingly.

3.6 Suspension or Debarment

OneJax may by written notice to the Successful Vendor, immediately terminate the Agreement if OneJax determines that the Successful Vendor has been debarred, suspended or otherwise lawfully prohibited from participating in any public procurement activity including, but limited to, being disapproved as a subcontractor Vendor of any public procurement unit or other governmental body.

3.7 Continuation of Performance through Termination

The Successful Vendor shall continue to perform, in accordance with the requirements of Agreement, up to the date of termination as directed in the termination notice.

4.0 CERTIFICATION AND FORMS

4.1 Certification of Proposal

Explanation: This certification attests to the Vendor’s awareness and agreement to the content of this Request for Proposal (RFP) and all accompanying terms, conditions and provisions contained herein. In addition, any documents incorporated by reference in the requests for additional language or request for revisions and any and all forms OneJax will need to fill out, prepare or submit to Vendor if awarded the contract must be included in Vendor’s solicitation response.

Action: Vendor is to ensure that the following certificate is duly completed and correctly executed by an authorized officer of your company.

This proposal is submitted in response to Request for Proposal #24-01 issued by OneJax. The undersigned, as a duly authorized officer, hereby certifies that

(Vendor Name)

agrees to be bound by the content of this proposal and agrees to comply with the terms, conditions and provisions of the referenced RFP and any addenda thereto in the event of an award. Exceptions are to be noted as stated in the RFP. The proposal shall remain in effect for a period of (90) calendar days as of the Due Date for responses to the RFP.

The undersigned further certifies that their firm (check one) ___IS or ___IS NOT currently debarred, suspended or proposed for debarment by any federal entity. The undersigned agrees to notify OneJax of any change in this status, should one occur, until such time as an award has been made under this procurement action.

Name of Official: _____

Title: _____

Company Name: _____

Signature: _____

Date: _____

4.2 Conflict of Interest Certificate

Proposer must execute either Section I or Section II hereunder relative to §112.313(12), Fla. Stat. Failure to execute either section may result in rejection of this proposal.

SECTION I

I hereby certify that no official or employee of OneJax requiring the goods or services described in these specifications has a material financial interest in this company.

Name of Official: _____

Title: _____

Company Name: _____

Signature: _____

Date: _____

SECTION II

I hereby certify that the following named OneJax official(s) and/or employee(s) having material financial interest (in excess of 5 percent) in this company have filed Conflict of Interest Statements with OneJax prior to the time of proposal opening.

Name of Official: _____

Title: _____

Company Name: _____

Signature: _____

Date of Filing: _____

Business Address: _____

City/State/Zip _____

4.3 Public Official Disclosure

OneJax requires that a public official who has a financial interest in a proposal or contract make a disclosure at the time that the proposal or contract is submitted, or at the time that the public official acquires a financial interest in the proposal or contract. Please provide disclosure, if applicable, with proposal.

Public Official: _____

Position Held: _____

Position/Relationship w/ Proposer: _____

4.4 Addendum Acknowledgment

I, the undersigned, acknowledge the receipt of:

Addendum # _____ through Addendum # _____

All addenda to this RFP #24-01 shall become part of your firm’s competitive solicitation response and the subsequent contract, if applicable.

OneJax has no obligation to furnish addenda by any other means than posting to its website. Failure to acknowledge addendum/addenda issued as a result of this Request for Proposal and returning this form with your response may result in disqualification of your response to this RFP.

Name of Official: _____

Title: _____

Company Name: _____

Signature: _____

Date: _____