



REQUEST FOR PROPOSAL

1.0 Invitation for Proposal

1.1 The Society invites proposals for auditing of financial records of the Society, the Society's Foundation, and the Political Education Committee for five successive fiscal years. The fiscal years concerned are as follows: ending on March 31, 2022, 2023, 2024, 2025, and 2026. In addition, the Society requires the preparation of all applicable federal and state income tax returns for the same years. This request does not include our payroll-tax-related returns. The successful party is to furnish all equipment and all labor and materials necessary for the performance of the work called for in the contract specifications. Proposals may be submitted by certified public accountants holding a valid license to practice public accounting in the state of Nebraska or a partnership or professional corporation holding such license in Nebraska.

2.0 Proposal Procedures

- 2.1 **Proposals must contain all information requested in the Proposal Requirements (Section 3.0) to be considered.** In submitting a proposal, the submitter represents they have read the proposal documents, the proposal is submitted in accordance therewith, and the submitter is familiar with local conditions under which the work is to be performed. Any incomplete proposals, or any reservations, exceptions, or qualifications to the proposal not permitted under the proposal documents shall be grounds to reject the proposal.
- 2.2 Proposals shall include the legal name of the submitter and shall be signed by a person with legal authority to bind the party to a contract.
- 2.3 The Contract Specifications require the auditor performing the work to prepare audit reports in accordance with applicable Generally Accepted Auditing Standards.

3.0 Proposal Requirements

- 3.1 All proposals submitted must contain at least the following information organized as set forth below, and omission of any such information may be grounds for rejecting the proposal.
- A. Table of Contents. Identifying the material submitted by section, page number, and organized to set forth the information required in this section.
- B. Firm Profile. Include the following minimum information:
1. Firm size, organization, and scope of its practice (i.e., local, regional, national, or international).
 2. Location and number of professional personnel in the local office from which work is to be performed.
- C. Qualifications and Experience. Including the following minimum information:
1. Describe your firm's experience in serving similar 501(c)(6) and 501(c)(3) non-profit organizations.

2. Include resume of the lead auditor who will be assigned to the audit. The resume may include:
 - a. The amount of experience the individual has had in the profession.
 - b. A summary of experience with similar clients with which the individual has worked.
 - c. A statement as to whether the individuals are independent with respect to the engagement, as defined by Generally Accepted Auditing Standards.
- D. Proposed Time Schedule.
 1. Proposed time schedule for completing the work, including the latest delivery date for the final reports and tax returns. Society presents for review and approval to the Board of Directors and/or Executive Committee the financial audits at the Society Board of Directors meeting in August and the tax returns at the meeting in October.
- E. Fees and Expenses.
 1. Maximum total cost, per fiscal year, in fees and reimbursable out-of-pocket expenses that will not be exceeded.
 2. How you handle billings surrounding periodic calls and questions that occur from time to time outside the audit and tax preparation cycle.
- F. Acknowledgment of Submitter.
 1. A written acknowledgment stating that the party has read all proposal documents, that the proposal is submitted in accordance therewith, and that the party will enter into a contract with the Society if submitter's proposal is accepted.
- G. Length Restriction.
 1. The written document needs to be 10 or less pages including all addenda or appendices.

4.0 Modification or Withdrawal of Proposals

- 4.1 Proposals may not be modified, withdrawn, or canceled for sixty (60) days following the time and date designated for receipt of proposals and may be accepted by the Society at any time during such 60-day period.
- 4.2 Prior to the time and date designated for receipt of proposals, proposals submitted early may be modified or withdrawn only by notice to the Society office prior to the time designated for receipt of proposal. Withdrawn proposals may be resubmitted up to the time designated for receipt of proposals as long as the proposal fully complies with the proposal documents.

5.0 Consideration of Proposals

- 5.1 The Society reserves the right to reject any and all proposals and to waive any technicalities or irregularities in any proposal received. The Society may award the contract as the Society in its sole discretion may determine. Cost of the services to be rendered shall not be the sole criteria in evaluating proposals and awarding a contract, and the Society may consider any other factors it deems relevant in awarding a contract, including but not limited to experience, qualifications, competence, number of personnel, personnel to do assigned services, ability to meet time deadlines, past experience, other regulator's requirements, and other factors determined to be appropriate by the Society.