

# Arrow Child & Family Ministries

## REQUEST FOR PROPOSAL (RFP)

Arrow Is Requesting Proposals For Professional Audit And Tax Services From Qualified Certified Public Accounting Firms To Perform The Annual Audit Of Its Financial Statements For Up To Five Fiscal Years (fiscal Years Ending June 30, 2023 To June 30, 2027) And Provide Other Tax-related And Supplemental Cost Reporting Services.

## PROFESSIONAL AUDIT AND TAX SERVICES

Arrow Child & Family Ministries  
2929 FM 2920 Rd  
Spring, Texas 77388  
Phone: 281-210-1500 | Fax: 281-210-1564

**RFP ID: ArrowACCT-0002**

**Prepared By: Debi Tengler**

**Date: November 14, 2022**

REQUEST FOR PROPOSAL  
PROFESSIONAL AUDIT AND TAX SERVICES  
Spring - Texas

**RFP ID:** ArrowACCT-0002

**PROPOSAL SUBMISSION DEADLINE:** December 30, 2022, 5:00 PM CST

Questions may be submitted in written form to:

**Contact Name:** Anjanette Sauers  
**Contact Address:** 2929 FM2920  
Spring, Texas 77388  
**Telephone Number:**  
**Email Address:** Anjanette.sauers@arrow.org

**INTRODUCTION**

Arrow Child & Family Ministries invites and welcomes proposals for their Professional Audit and Tax Services project. Based on your previous work experience, your firm has been selected to receive this RFP and is invited to submit a proposal. Please take the time to carefully read and become familiar with the proposal requirements. All proposals submitted for consideration must be received by the time specified above under the "PROPOSAL SUBMISSION DEADLINE."

*BIDDERS SHOULD NOTE THAT ANY AND ALL WORK INTENDED TO BE SUBCONTRACTED AS PART OF THE BID SUBMITTAL MUST BE ACCOMPANIED BY BACKGROUND MATERIALS AND REFERENCES FOR PROPOSED SUBCONTRACTOR(S) – NO EXCEPTIONS.*

**PROJECT AND LOCATION**

The project associated with this RFP is or shall be located at 2929 FM 2920 Rd, Spring, Texas 77388.

**PROJECT MANAGER CONTACT INFORMATION**

The following individual(s) are the assigned contacts for the following:

For questions or information regarding Pro Audit and Tax Svcs RFP, contact:

**Name:** Anjanette Sauers  
**Title:** VP Finance  
**Phone:**  
**Fax:**  
**Email:** Anjanette.sauers@arrow.org

**PROJECT OBJECTIVE**

The objective and ultimate goal for this project is to identify the most qualified firm. It is the intent of Arrow to award a contract to the one firm that offers the most advantageous professional audit and tax services and can meet all the deadlines outlined in the RFP to Arrow at a reasonable cost. .

**PROJECT SCOPE AND SPECIFICATIONS**

The Project Scope and Specification are:

Professional Audit and Tax Services

Arrow is requesting proposals for Professional Audit and Tax Services from qualified certified public accounting firms to perform the annual audit of its financial statements for up to five fiscal years (fiscal years ending June 30, 2023 to June 30, 2027) and provide other tax-related and supplemental cost reporting services.

Open date: 5:00pm CST, Monday, November 14, 2022  
Closing date: 5:00pm CST, Friday, December 30, 2022

## **SCHEDULED TIMELINE**

The following timeline has been established to ensure that our project objective is achieved; however, the following project timeline shall be subject to change when deemed necessary by management.

<b>MILESTONE</b>	<b>DATE</b>
Annual Audit of Arrow's Financial Statements for up to five years:	June 30, 2023
Additional tax-related and supplemental cost reporting services for up to five years.:	June 30, 2022

## **PROPOSAL BIDDING REQUIREMENTS**

### **PROJECT PROPOSAL EXPECTATIONS**

Arrow Child & Family Ministries shall award the contract to the proposal that best accommodates the various project requirements. Arrow Child & Family Ministries reserves the right to: (i) award any contract prior to the proposal deadline or prior to the receipt of all proposals, (ii) award the contract to more than one Bidder, and (iii) refuse any proposal or contract.

### **DEADLINE TO SUBMIT PROPOSAL**

All proposals must be received by Arrow Child & Family Ministries no later than 5:00 PM CST on December 30, 2022 for consideration in the project proposal selection process.

### **PROPOSAL SELECTION CRITERIA**

Only those proposals received by the stated deadline will be considered. All proposals, submitted by the deadline, will be reviewed and evaluated based upon information provided in the submitted proposal. In addition, consideration will be given to cost and performance projections. Furthermore, the following criteria will be given considerable weight in the proposal selection process:

1. Proposals received by the stipulated deadline must be in the correct format.
2. Bidder's alleged performance effectiveness of their proposal's solution.
3. Bidder's performance history and alleged ability to timely deliver proposed services.
4. Bidder's ability to provide and deliver qualified personnel having the knowledge and skills required to effectively and efficiently execute proposed services.
5. Overall cost effectiveness of the proposal.

Arrow Child & Family Ministries reserves the right to cancel, suspend, and/or discontinue any proposal at any time, without obligation or notice to the proposing bidder.

### **PROPOSAL SUBMISSION FORMAT**

The following is a list of information that the Bidder should include in their proposal submission:

#### **Summary of Bidder Background**

1. Bidder's Name(s)
2. Bidder's Address
3. Bidder's Contact Information (and preferred method of communication)
4. Legal Formation of Bidder (e.g. sole proprietor, partnership, corporation)
5. Date Bidder's Company was Formed
6. Description of Bidder's company in terms of size, range and types of services offered and clientele.
7. Bidder's principal officers (e.g. President, Chairman, Vice President(s), Secretary, Chief Operating Officer, Chief Financial Officer, General Managers) and length of time each officer has performed in his/her field of expertise.
8. Bidder's Federal Employee Identification Number (FEIN)
9. Evidence of legal authority to conduct business in Texas (e.g. business license number).
10. Evidence of established track record for providing services and/or deliverables that are the subject of this proposal.
11. Organization chart showing key personnel that would provide services to Arrow Child & Family Ministries

#### **Financial Information**

- State whether the Bidder or its parent company (if any) has ever filed for bankruptcy or any form of reorganization under the bankruptcy code.
- State whether the Bidder or its parent company (if any) has ever received any sanctions or is currently under

investigation by any regulatory or governmental body.

**Proposed Outcome**

- Summary of timeline and work to be completed.

**Equipment or Service**

- List any or equipment or services required of a subcontractor, along with a brief explanation.
- List any accommodation, services, or space required from Arrow Child & Family Ministries, along with a brief explanation.

**Cost Proposal Summary and Breakdown**

- A detailed list of any and all expected costs or expenses related to the proposed project.
- Summary and explanation of any other contributing expenses to the total cost.
- Brief summary of the total cost of the proposal.

**Licensing and Bonding**

- Provide details of licenses and bonds (if any) for any proposed services that the bidder/contractor may plan on providing for this project.

**Insurance**

- Details of any liability or other insurance provided with regard to the staff or project.

**References**

- Provide Three references

By submitted a proposal, Bidder agrees that Arrow Child & Family Ministries may contact all submitted references to obtain any and all information regarding Bidder's performance.