



Request for Proposals from CPA Firms for Proposal of Audit

**San Antonio Foundation for Excellence in Education, Inc.
dba SAISD Foundation**

The SAISD Foundation is seeking proposals from independent CPA firms to provide audit services for our organization. Proposals must be submitted to us by February 18th, 2019 in order to qualify for consideration.

Background of SAISD Foundation

The SAISD Foundation is a growing 501(c)(3) non-profit education foundation that supports innovation and strategic programs in San Antonio ISD schools. 2018 revenues are approximately \$3.9 million with a fiscal year-end date of December 31st. The organization employs four people in one location and utilizes QuickBooks Plus online as its accounting software.

Services to be Performed

Your proposal is expected to cover the following service: Annual audit to be completed in compliance with GAAP and state law requirements no later than April 18th, 2019.

Key Personnel

The following are key contacts for information you may seek in preparing your proposal:

- Judy Geelhoed, Executive Director – jgeelhoed@saisdfoundation.com
- Jennifer Twiss, Finance & Grants Manager – jtwiss@saisdfoundation.com

Email Jennifer Twiss to request copies of our 990 and financial documents. For additional information, please contact Judy Geelhoed.

Relationship with Existing CPA Service Provider

These services have been provided by Garza-Gonzalez & Associates. We are seeking proposals from our existing CPA service provider as well as other CPA firms.

Your Response to this Request for Proposal

In responding to this request, we request the following information:

1. Detail your firm's experience in providing auditing services to Texas companies in the non-profit sector of a comparable size to SAISD Foundation.
2. Provide the physical address of the office whose employees will be performing the audit.
3. Discuss the firm's independence with respect to SAISD Foundation.
4. Of the five largest clients your firm (or office) has lost in the past three years, please identify the reasons. Also discuss, in instances where loss of the client was due to an

unresolved auditing or accounting matter, the process of attempting to resolve the issue(s).

5. Identify the partner, manager, and in-charge accountant who will be assigned to our job if you are successful in your bid, and provide biographies. Indicate any complaints against them that have been filed with any state board of accountancy or other regulatory authority, if any. Indicate any resulting discipline and corrective actions that have been taken by the firm with respect to these people.
6. Describe how your firm will approach the audit of this organization, including the level of assistance required by SAISD Foundation staff and whether information can be retrieved online through QuickBooks.
7. Discuss the communication process used by the firm to discuss issues with the executive and finance committees of the SAISD Foundation board.
8. Provide a line item fee proposal for the 2018 audit, include any price guarantees that can be given regarding fee increases in future years.
9. Provide the names and contact information for other, similarly sized Texas non-profit clients of the partner and manager that will be assigned to our organization for reference purposes.
10. Describe how and why your firm is different from other firms being considered, and why our selection of your firm as our independent auditor is the best decision we could make.

For questions, contact Judy Geelhoed at (210) 554-2235 or by email jgeelhoed@saisdfoundation.com.

If you are interested in responding to this RFP, please submit your proposal by scan to jgeelhoed@saisdfoundation.com AND U.S. Mail to:

SAISD Foundation
2411 San Pedro Ave.
San Antonio, Texas 78212

Proposals must be received by 5:00 PM on February 18th, 2019.