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P: 315-379-7701 | F: 315-379-7707****info@nysarh.org**[**www.nysarh.org**](http://www.nysarh.org) **|** [**www.facebook./NYSARH**](http://www.facebook./NYSARH)

2019

CPA Firm
Address

Dear Sir or Madam:

New York State Association for Rural Health (NYSARH) is requesting proposals from CPA firms with experience in providing audit services for nonprofit organizations. We invite your firm to submit a proposal to us by [Date] for consideration. A description of our organization, the services needed, and other pertinent information follows:

# Background of New York State Association for Rural Health (NYSARH)

NYSARH is a New York nonprofit corporation that is recognized by the Internal Revenue Service as a tax-exempt organization pursuant to section 501 c (3) of the Internal Revenue Code. NYSARH was founded in 2001 to improve the health and well-being of rural New Yorkers and their communities.

NYSARH functions as the “voice for rural health.” It is a statewide organization advocating for the health of rural New Yorkers. NYSARH advocates at the national and state levels on behalf of its membership.

The annual budget is approximately $x,xxx,xxx per year comprised of grant and funding opportunities. Our goal is to become operationally and financially sustainable through entering into Value Based Payment contracts with Medicaid Managed Care Organizations with

NYSARH maintains all accounting records in-house and uses QuickBooks for the accounting system. We have a Finance Committee that will be responsible for the final selection of auditors.

# Services to Be Performed

1. Annual audit of the financial statements for 2019 Fiscal Year (January 1, 2019 – December 31, 2019).
2. Meeting with the Audit Committee and the Board of Directors as necessary.
3. Preparation of federal and state information returns for the organization for 2019.
4. Availability throughout the year to provide advice and guidance on financial accounting and reporting issues.

# Timeframe

The following is the anticipated timeframe for the services to be provided: XXXXX Award of audit contract

XXXXX Teleconference with Treasurer and Audit Committee to discuss the audit plan XXXXX Receive a list of client provided documents

XXXXX Financial statement draft for management review

XXXXX Presentation to audit committee of results of Audit

XXXXX Finalize information returns

# Proposal Content

In order to simplify the evaluation process and obtain maximum comparability, all proposals should contain the following information:

1. Executive Summary

Describe your understanding of the work to be performed, the estimated fees, and your firm’s ability to perform the work within the timeframe provided.

1. Service Approach and Timeline

Describe how your firm will approach the proposed services, including the staff to be assigned and the type of assistance required from NYSARH.

1. Professional Experience

Describe your firm’s size, structure, and qualifications with serving nonprofit organizations with similar size and operations. Describe the firm’s independence with respect to NYSARH. Include a list of the relevant nonprofit clients the firm has served within the past three years and furnish the names and telephone numbers of any references we may contact.

1. Team Qualifications

Identify the specific partners and managers who will be assigned to this engagement. Provide their biographies specifying relevant experience to the type of service requested. Also discuss commitments you make to staff continuity.

1. Fees

Please provide a firm estimate of fees for the services to be provided. Given that time required in the first year will likely be more substantial than subsequent years, please feel free to include fees for subsequent years as well as provide any guarantees that can be made regarding increases in future years.

1. Additional Questions/Information
* Please include a copy of your firm’s most recent Peer Review report, the related letters of comments, and the firm’s response to the letters of comments.
* Describe how you bill for questions on technical matters that may arise throughout the year.
* Please provide any additional information, not specifically requested, but which you believe would be useful in evaluating your proposal.

Key Contacts

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

* Helen Evans, President
Phone: 585-593-5223, ext. 1011
Email: evansh@ardentnetwork.org
* David Riddell, Treasurer
Phone: 585-786-6275
Email: driddell@r-ahec.org
* Karin Blackburn, Director of Administrative Services
Phone: 315-379-7701
Email: karin@nysarh.org
* Katie Rafferty, Accounting Manager
Phone: 315-379-7701
Email: katie@nysarh.org

Sincerely,

Karin Blackburn
Director of Administrative Services
New York State Association for Rural Health

Attachments:

2017 & 2018 Audit Reports, 990, & CHAR500