



Harambee Institute of Science & Technology Charter School

Request for Proposals for Audit, Form 990, PDE AFR

I. INTRODUCTION

Harambee Institute of Science & Technology Charter School (HISTCS) is a nonprofit organization that is soliciting proposals from firms to complete and perform the Independent Annual Financial Audit, IRS Form 990 tax return, and the Pennsylvania Department of Education - Annual Financial Reporting services. This Request for Proposals (RFP) contains background information on HISTCS and specific information that must be included in the submissions that wish to be seriously considered. The proposals must be emailed no later than May 31, 2019 directly to our office at the following address: business@histcs.org.

HISTCS background and other pertinent information:

Established in 1997, HISTCS is one of the first African-centered charter schools formed as a 501(c)(3) organization in the state of Pennsylvania. With a focus on Science and Technology, HISTCS is an elementary public school serving over 525 students in grades K-8.

- ❖ HISTCS has an operating budget of \$7.2 million dollars, and operates on a fiscal year beginning July 1 and ending June 30th.
- ❖ There are forty full-time employees and five part-time, and HISTCS offers a defined benefit and defined contribution retirement plans for qualified members.
- ❖ The Business Department is managed by a third-party operator, and transactions are performed through QuickBooks accounting software.
- ❖ HISTCS has a food service program funded through the Pennsylvania Department of Education School Nutrition Program, and an afterschool program funded through a 21st Century Community Learning Center grant that meets the qualifications for a single audit.

II. PROPOSAL REQUIREMENTS

Responses should be formatted using the following outline:

- **Experience (max. score 30):** Experience of the firm, size, location, and area of expertise. Provide a list of references of comparable engagements. Include email address and phone number of contact person. Must have a minimum of (5) years' experience on similar engagements to be considered.

Education for Self-reliance

- **Team (max. score 25):** Engagement team assigned. Description of who will be working on this engagement and comparable experience.
- **Transition (max score 10):** Transition expertise. Description of plan for transitioning from the prior auditors and expectation of HISTCS staff.
- **Approach (max. score 10):** Describe audit approach and how it benefits the HISTCS organization, including firm’s philosophy on communications with clients throughout the year, scheduling of engagements, and continuity of staff on audits. Include expected timetable deliverables.
- **Quality Control (max score 15):** Include copy of most recent peer review report, and describe your commitment to quality control, and compliance with continuing education requirements.
- **Fees (max. score 10):** Provide by service, staff, hours, hourly rate, including professional fees and any expected out of pocket expenses.
- Limit proposal to no more than (10) pages including attachments. Use font size no less than 11 points.

III. RFP Process

4/17/19 - RFP published.

4/17 – 4/26/19 – Q&A timeframe. Submit all questions by 4/24/19, and answers will be provided by 5/1/19.

Submit any questions via email to business@histcs.org, and include the words “AUDIT RFP” in the subject line. All questions and answers will be shared with all applicants.

5/31/19 – Deadline for proposal submission. Submit proposal via email to business@histcs.org, and deliver (5) hard copies in a sealed envelope to:

**Harambee Charter School
Attn: Michelle Thornton
640 N. 66th Street
Philadelphia, PA 19151**

6/19/19 – Committee recommendation to the board of directors.

6/21/19 – Final decision and announcement to bidders.

7/1/2019 – Start of engagement

Thank you for your interest!