
Villa of Hope

Request for Proposals for Audit Services

RFP Release: May 10, 2022

RFP Questions due: May 16, 2022

RFP Intent due: May 16, 2022

RFP Response Deadline: May 24, 2022 12:00pm EST

All inquiries for additional information should be directed to Chetna Chandrakala, Chief Financial Officer for Villa of Hope, by email to Chetna.Chandrakala@villaofhope.org.

About Villa of Hope

History and background of the Villa with description of its services:

Villa of Hope, referred to as the Villa throughout this RFP, is a non-profit agency based in Rochester, New York that provides direct services to over 4,000 individuals, families, and community with complex challenges, annually through a continuum of high quality Behavioral Health (mental health and substance use), Community, Education, and work force development services. With locations in Monroe County and one in Ontario, the Villa employs over 350 staff. The Villa is fully accredited by the Council on Accreditation, and is licensed by the NYS Office of Mental Health, NYS Office of Children and Family Services, NYS Office of Alcoholism and Substance Abuse Services, and NYS Education Department.

Specific services that the Villa provides include:

- Behavioral Health
 - Substance Abuse
 - Chemical Dependency Outpatient Clinic
 - Mental Health Outpatient Clinic
 - NYS License Prevention Services
 - Inpatient detox services
- Residential
 - Aftercare
 - Community Apartment Program
- Community Programs:
 - Youth Mentoring
 - ED Diversion
 - Health Home (Children & Adult)
 - Aftercare
 - Juvenile Reporting Center
 - Family Support Services/Prevention
- Community and Residential School
- Work Force Development
- ED Diversion – Hope Place

Villa services are provided across multiple physical locations and program types including but not limited to:

- Residential Treatment
- Community Based Programs
- Care Management Programs
- Inpatient Detox Program

Scope of Work

Villa of Hope is looking for audit services along with following services:

1. Annual financial statement audit (starting Fiscal year July 2021-June 2022)
2. Single Audit
3. Preparation of IRS form 990/CHAR500.
4. Retirement Plan Audit
5. CFR/SSOP review

All of the above must be completed within 120 days of the end of each fiscal year (July-June), in order for our Board to review each document prior to its submission to the appropriate recipients. The timeline will adjust in accordance with the regulatory requirements for State Cost reports. In addition, we require at least two meetings in a year with the Finance/Audit Committee and the Board for a pre-audit meeting and to discuss a draft version of the financial statements.

Proposal Requirements

The following documentation should be included in your proposal. Only complete proposals will be considered.

- Cover letter
- Company overview
- Detailed proposal – complete with all responses below
- Proposed timeline for all services
- Other documentation

Responses to be included in the Proposal

As part of your proposal, please include the following:

1. Experience in serving Non-profits, preferably of the size and complexity similar to that of the Villa
 - Number of Years
 - Number of Clients
 - Three local NFP references
2. Evidence of the firm's qualifications to provide the above services;
3. Background and experience in auditing nonprofit clients;
4. The size and organizational structure of the auditor's firm;
5. Statement of the firm's understanding of work to be performed, including tax and non-audit services;
6. A proposed timeline for fieldwork and final reporting;
7. Proposed fee structure for each of the three years of the proposal period, including whatever guarantees can be given regarding increases in future years, and the maximum fee that would be charged;
8. Describe your billing rates and procedures for technical questions that may come up during the year, or whether these occasional services are covered in the proposed fee structure;
9. Names of the partner, audit manager, and field staff a.k.a the relationship team who will be assigned to our audit and provide biographies.
10. A copy of your firm's most recent peer review report, the related letter of comments, and the firm's response to the letter of comments; and
11. References and contact information from at least two comparable nonprofit audit clients.

Additional Information

Villa is providing the following information with this proposal:

1. Audited financial statements for past two years
2. Single Audit report for past two years
3. Retirement Plan Audit Report for past two years

You may need additional information and may have questions regarding this request for proposal. Please submit the required information request by **May 16** directed to:

Chetna Chandrakala, Chief Financial Officer

Villa of Hope

Chetna.Chandrakala@villaofhope.org.

Cell: 585.512.4315

Selection Process

Selection of the financial institution will be recommended by Villa of Hope's Finance Committee to the Board of Directors for their approval. Selection criteria will be based on the following:

- Experience with Non-profits similar to the Villa
- Comprehensiveness of Proposal
- Fee for services
- Relationship with Villa of Hope
- Three references
- At our discretion, Villa of Hope may seek interviews with final 2-3 prospects

Proposed Timeline

Timeline for proposal process:

- RFP Questions: **May 16, 2022**
- RFP Intent: **May 16, 2022**
- Submission deadline: **May 24, 2022, noon** per date at beginning of proposal
- Submission review by Finance Committee and Board of Directors: **June 1, 2022**
- Applicants notified of decision by **June 3, 2022**

EVALUATION OF PROPOSALS

All proposals must be complete and convey all of the requested information, in the prescribed format, in order to be considered responsive. Response to proposals will be evaluated by Villa of Hope Audit Committee. Villa reserves the right to select some or all of the proposed services depending on cost and need.

Villa of Hope may cancel this RFP or reject proposals at any time prior to an award and is not required to supply a statement of the reasons why a particular firm was not chosen.

Confidentiality & Signature Certification

I acknowledge that during this RFP process, confidential information may be made available to our organization and we ensure that this information shall remain confidential, will not be disclosed or used for any other purposes other than this RFP.

I certify that I am authorized to sign this request for proposal, for myself or the financial institution in which I represent. By signing and submitting this form, I acknowledge I understand the terms presented and have supplied accurate responses to best of my knowledge.

Legal name: _____

Address: _____

City/State/Zip: _____

Name/Title of Authorized Responder: _____

Signature of Authorized Responder: _____

Date of Signature: _____