Request for Proposal

Certified Public Accounting Services

Elder Options, a designated Area Agency on Aging, announces a Request for Proposals from qualified Certified Public Accounting (CPA) firms to provide financial statements, accounting services, audit assistance, and tax reporting requirements.

Elder Options is seeking proposals from qualified CPA firms to provide financial statements, accounting services, audit assistance, and tax reporting requirements. Elder Options is a non-profit, 501(c)3 corporation dedicated to serving older adults and their caregivers. We serve as an Area Agency on Aging, as established by Chapters 20 & 430, F.S., and Federal Older Americans Act (OAA). The agency receives and administers multiple federal, state, and local grants exceeding $30 million annually and requires a CPA firm with proven experience in complex grant environments and accounting procedures and bookkeeping requirements.

Elder Options operates a wide range of programs that support aging individuals, including but not limited to home and community-based services, nutrition programs, and other mission-critical initiatives. Our funding sources include:

• Federal grants (e.g., Older Americans Act,)

• State of Florida Department of Elder Affairs funding

• Local agency allocations

• Private grants and donor contributions

Total annual funding exceeds $30 million, requiring robust financial oversight and compliance with federal Uniform Administrative Requirements, Cost Principles, and Audit Requirements (2 CFR Part 200).

Scope of Services

Accounting Services

• Monthly reconciliation of all bank accounts and balance sheet accounts (Accounts Receivable, Prepaids and Other Assets, Accounts Payable, etc.)

• Weekly processing of accounts payable invoices through MIP accounting system

• Weekly processing of checks/ACH payments of accounts payable invoices

• Record monthly revenue and accounts receivable entries

• Maintain schedules of all fixed assets, depreciation, prepayments and unearned revenues

• Record bi-weekly payroll in the accounting software

• Record in-kind entries

• Maintenance of general ledger activity

• Assistance with annual grant closeout reports

• Import annual budget

• Prepare monthly Medicaid reporting package

• Bi-weekly 30 minute status meeting

• Presentation of financial statements at board meetings

• Advisory as needed on issues such as budgeting, grant reporting, indirect methodology, etc.

Audit Assistance

• Work with and provide requested documents to Elder Options' separate external independent auditing firm that conducts the yearly single audit

• Training of Elder Options staff on audit process and schedules

• Assistance with providing information on auditor client assistance list

• Assistance with preparation of schedules for auditor including Statement of Functional Expense and Schedule of Expenditure of Federal Awards

Tax Reporting Requirements

• Assist the auditor with the preparation of IRS form 990

• Prepare and submit all 1099 filings

Certified Public Accounting Firm Responsibilities

Perform services in accordance with the Statement on Standards for Consulting Services and the Code of Professional conduct issued by the American Institute of Certified Public Accountants.

The objective of engagement is to:

a. Prepare financial statements in accordance with accounting principles generally accepted in the United States of America based on information provided by Elder Options; and

b. Apply accounting and financial reporting expertise to assist Elder Options in the presentation of financial statements, without undertaking to obtain or provide any assurance for monthly updates, to be presented to Elder Options Board members by the firm, upon request.

Proposal Requirements

Interested firms should submit a proposal that includes:

1. Firm Overview
    a. History and Capacity
        i. Provide the history and size of the firm, including whether it is a local, regional, or national firm
        ii. Indicate the numbers of partners, managers, supervisors, seniors, and staff members that are employed by the office
        iii. Office location from which the work will be performed
    b. Relevant Experience - Detail experience with Florida nonprofits and aging service organizations. Specifically highlight experience with agencies receiving $1M+ in federal/state grants and experience in Single Audits under Uniform Guidance (2CFR 200).
    c. Staff Continuity - Describe the firm's commitment to staff continuity and stability or personnel assigned to this agreement.
2. Team Qualifications
    a. Key Personnel – Provide bios for the engagement partner, manager, and key staff. Include their specific background in aging services or human service agencies.
    b. Credentials – Detail governmental and nonprofit audit credentials (e.g., Yellow Book/GAGAS qualifications).
    c. CPE Compliance – Confirm that all assigned staff are current with Continuing Professional Education (CPE) requirements related to Government Auditing Standards.
3. Fees
    a. Transparent Fee Schedule – Provide a fixed fee for the above requested accounting services.
    b. Tax Services – Fees for Form 990 preparation.
    c. Additional Services – Hourly rates for additional consulting.

    d. Multi-Year Projection – Total cost for each year for a multiple year RFP approval to be awarded for an initial term of three (3) years. The RFP approval may be renewed for three (3) additional one-year periods provided both parties agree and all terms and conditions remain the same. Total RFP approval length, including individual one-year extensions, shall not exceed six (6) years.
        i. Consideration of price increases at each renewal period will be given provided such escalations are justified, reasonable and acceptable to Elder Options.
        ii. Any price increases must be documented and approved by Elder Options.
        iii. It is also expected that de-escalation of prices will be extended to Elder Options if the market so reflects.
4. Engagement Letter
    a. Proposed engagement letter listing proposed terms.
5. Accounting Approach
    a. Understanding of Scope – A statement setting forth your understanding of the work, the complexity of diverse grant funding, and the specific reporting needs of aging service providers.
    b. Communication – Outline the process for communication with agency leadership and the timeline for fieldwork, draft reports, and final issuance.
    c. Staffing Plan – Breakdown of staff levels, estimated hours, and percentage of time assigned to the engagement.
6. References and Past Performance
    a. Client References – Provide at least three nonprofit or grant-funded clients (preferably Florida-based) in the aging industry.
    b. Performance History – For each reference, include a contact name, phone number, and description of services. Highlight your history of meeting deadlines and maintaining long-term client relationships.
7. Required Disclosures and Risk Assessment
    a. Peer Review – Provide the most recent peer review report.
    b. Regulatory History – Results of any federal or state desk/field reviews in the past three years. Provide details on any disciplinary actions taken or pending.
    c. Litigation – Describe any litigation in the last five years regarding breach of contract or any failed/incomplete contracts for similar services.
    d. Independence – Provide a formal independence confirmation.
8. Technical Approach and Methodology
    a. Technical Methodology – Describe the approach to accounting, financial reporting, and journaling.

b. Internal Controls – Describe the approach to assessing internal controls and grant compliance.
c. Technology and Efficiency – Describe the use of technology and software tools to support audit efficiency and secure data exchange.

Evaluation Criteria

The evaluation criteria is outlined in the Proposal Evaluation Scoring Matrix below.

Schedule

October 14, 2026

RFP advertised, released, and documents available on website at agingresources.org/news

October 26, 2026 at 1:00 pm via Zoom

Pre-proposal conference

https://agingresources-org.zoom.us/j/87040592171?pwd=MazWF6jc6eZaSHQeeuni2zydJ9Xz2I.1

October 28, 2026 at 5:00 pm

Deadline for written inquiries/questions

Send to kreischerj@agingresources.org with Subject “CPA RFP Inquiries/ Questions”

November 3, 2026

Responses to inquiries/questions available on website at agingresources.org/news

November 10, 2026 at 3:00 pm

Deadline for submission

November 10, 2026 at 3:05 pm

Proposals opened and reviewed for fatal criteria

November 18, 2026

Grant Review Committee Meeting

Meeting information is noticed in the Florida Administrative Register or may be requested from kreischerj@agingresources.org no later than 5:00 pm on November 17

December 9, 2026

Board of Directors Meeting

Meeting information is noticed in the Florida Administrative Register or may be requested from kreischerj@agingresources.org no later than 5:00 pm on December 8

December 10, 2026
Announcement of Final Award

Submission

Submit proposals electronically in PDF to:

Janet Kreischer
Director, Office of Program Operations
Elder Options
kreischerj@agingresources.org

Additional Notes

The agency reserves the right to:

- Request clarifications
- Conduct interviews
- Reject any or all proposals
- Award the contract based on overall value and qualifications

Proposal Evaluation Scoring Matrix

Below is the scoring matrix for evaluating firms responding to the CPA RFP. Each category includes weighted criteria aligned with the agency's needs, especially those related to federal and state grant compliance, relevant expertise, and nonprofit experience.

Scoring Summary Table Evaluation Category	Weight	Scoring Range	Description
1. Firm Qualifications & Experience	25%	0–25 points	Depth of experience with nonprofits, Florida agencies, and complex grant-funded audits over $1 million.
2. Team Expertise	20%	0–20 points	Credentials and relevant experience of engagement partner, manager, and key staff.
3. Fee Structure & Cost Reasonableness	20%	0–20 points	Competitiveness, clarity, and completeness of proposed fees.
4. Understanding of Agency Needs	15%	0–15 points	Demonstrated grasp of aging services, federal grants, internal control requirements, and programmatic complexities.
5. References & Past Performance	10%	0–10 points	Strength of references, performance with similar organizations, reliability, and quality of prior work.
6. Technical Approach & Methodology	10%	0–10 points	Proposed accounting, financial reporting, and journaling approach, description of internal controls, use of technology and software tools.
Total Possible Score	100%	**0–100 points**	

Detailed Evaluation Criteria

1. Firm Qualifications & Experience — 25 points

Evaluators should consider:

• Demonstrated experience with nonprofit organizations, especially Florida-based

• Expertise in Single Audits and Uniform Guidance (2 CFR 200)

• History working with agencies receiving $1 million + in federal/state grants

• Recent and clean peer review report

• Stability and capacity to support multi-year engagements

Score Guidance: *0 – 10*: Limited experience, unclear relevance *11 – 20*: Adequate experience with some relevant engagements *21 – 25*: Strong, highly relevant experience with similar organizations

2. Team Expertise — 20 points

Evaluate the qualifications of the specific individuals assigned:

• Engagement partner's nonprofit and government audit background

• Government Auditing Standards (Yellow Book) CPE compliance

• Experience with aging services organizations or human services agencies

• Team continuity and structure

Score Guidance: 0 – 8: Team lacks depth or relevant credentials 9 – 15: Qualified team with moderate relevant experience 16 – 20: Highly qualified team with strong track record

3. Fee Structure & Cost Reasonableness — 20 points

Evaluate:

• Transparency of the fee structure

• Competitive pricing relative to scope

• Clarity of pricing

• Hourly rates for additional services

• Value for the level of expertise provided

Score Guidance: 0 – 8: Unclear or disproportionately high 9 – 15: Reasonable and market-aligned 16 – 20: Excellent value with transparent structure

4. Understanding of Agency Needs — 15 points

Measures how well the proposal demonstrates insight into the agency's environment:

• Complexity of large, diverse grants

• Aging services program structures

• Required reporting to funders and state agencies

• Internal control challenges typical in human-services nonprofits

Score Guidance: *0 – 5*: Minimal understanding *6 – 10*: Moderate understanding, reasonably articulated *11 – 15*: Deep understanding and thoughtful alignment with agency context

5. References & Past Performance — 10 points

Evaluate the quality of references, including:

• Similarity of referenced clients

• Reliability, responsiveness, and communication

• Ability to meet deadlines and deliver clear reports

• History of long-term relationships

Score Guidance: *0 – 4*: Weak or unclear references *5 – 7*: Adequate and relevant references *8 – 10*: Strong references with consistent positive performance

6. Technical Approach & Methodology — 10 points

Consider the firm's proposed approach, including:

• Approach to accounting, financial reporting, and journaling

• Description of internal controls and grant compliance

• Communication plan with agency leadership and finance staff

• Use of technology and software tools

Score Guidance: *0 – 4*: Vague or generic approach *5 – 7*: Clear plan with some customization *8 – 10*: Robust, detailed, and tailored to the agency