



**JUNIOR LEAGUE OF CORPUS CHRISTI, INC.**  
*Women building better communities®*

**REQUEST FOR PROPOSAL (RFP) - NON-PROFIT COMPILATION AND TAX  
SERVICE & NON-PROFIT AUDIT SERVICES**

The Junior League of Corpus Christi, Inc. (JLCC) invites you to submit a proposal for non-profit compilation and tax services and non-profit audit services. We anticipate a 24 - month engagement (depending on performance) with the option to renew.

Additional information about our organization and scope of services is provided in subsequent pages.

Questions Regarding RFP

Inquiries concerning this RFP should be submitted to [treasurer@jlcc.org](mailto:treasurer@jlcc.org) using the subject line: "Accounting RFP". Responses will be returned within 48 business hours.

Submission of Proposals

Documents must be submitted in PDF Format via email to [treasurer@jlcc.org](mailto:treasurer@jlcc.org) by 5:00pm on April 30, 2021.

**Send Proposals To:** Kristina Bednorz  
The Junior League of Corpus Christi, Inc.  
[treasurer@jlcc.org](mailto:treasurer@jlcc.org)  
Phone: (361)884-3000  
Subject Line: Accounting RFP

**Due Date & Time:** April 30, 2021, 5:00pm

**Contact Information:** Kristina Bednorz, Treasurer  
The Junior League of Corpus Christi, Inc.



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## **Section I. Organizational Overview**

### JLCC Mission

The Junior League of Corpus Christi, Inc. is an organization of women committed to promoting voluntarism, developing the potential of women, and improving the community through the effective action and leadership of trained volunteers. Its purpose is exclusively educational and charitable.

### JLCC Vision

Together we will build a better future by responding to community needs, working together for positive change, and enhancing the potential of our membership.

### JLCC History

Started in 1937 by Lorine Jones Spoots and twelve young women started what is known as the Junior Assistance Club. The Junior Assistance Club patterned itself from the beginning on the lines of the Junior League. The local Junior League was accepted into the Association of Junior Leagues of America in 1944, becoming one of 295 participating leagues in the United States, Canada, Mexico and England.

Since 1944, the Junior League of Corpus Christi, Inc. has continued its commitment to the city over the years by investing countless hours of volunteer service and hundreds of thousands of dollars in numerous community programs across the Coastal Bend. Further, we are a training organization focused on developing our members into civic leaders in the community. We are almost entirely volunteer-run, with only one part-time employee and a contracted bookkeeper on our payroll. The Junior League's fiscal year end is May 31.



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**Section II. Project Description**

A. Scope of Services Requested

The JLCC's financial statements are presented in accordance with FASB Accounting Standards for Non-for-Profit Organizations. The firm selected will be responsible for providing the following services for a period of 24 months with an option to extend the contract.

- Audit of the Annual Financial Statements every other year, beginning with the year ending (May 31, 2022) and preparation of the Auditor's Report.
- Professional Financial Statements via compilation services every other year beginning with the year ending (May 31, 2021).
- Prepare periodic reports as required by Executive Board
- Advice to the JLCC on any and all changes in accounting reporting requirements (throughout the year)
- Communicate timely with the JLCC Treasurer, Bookkeeper and JLCC President.
  - The Accounting Firm is to serve as a resource and be available for consultation on accounting and related issues throughout the fiscal year.
  - The JLCC Treasurer and Bookkeeper will be available to respond to questions and prepare any requested information. The JLCC Office Manager will also be available as required.



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**RFP Tentative Schedule**

<b>Event</b>	<b>Date</b>
RFP Issue Date	April 15, 2021
Bidder's questions deadline	April 22, 2021 by 5:00pm
Submission deadline	April 30, 2021 by 5:00pm
Notification of Selected Proposal	May 14, 2021

*The JLCC may change any of the above dates and times, including the RFP Submission Deadline at its sole discretion and without liability, cost, or penalty. In the event a change is made to any of the above dates, the JLCC will communicate such changes to proponents who have been in contact with the JLCC Treasurer.*

**Section III. Proposals**

**A. General Information**

Please include a cover sheet with the following information:

- Name of Contractor/Firm
- Contact Person
- Title
- Mailing Address
- Telephone Number
- Email
- Website

**B. Organizational Overview & Qualifications**

Please provide the following descriptions:

- Describe the firm, professional history & scope of practice
- Provide biographies of proposed team with resumes attached
- Explain how firm is a good fit with our organization, detailing experience with other non-profit clients of a similar size and scope

**C. Proposed Work Plan & Timeline**

Please provide the following descriptions:

- Proposal to fulfill the Scope of Services Requested as noted above



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**Section III. Proposals (continued.)**

- Outline of key steps and persons responsible, communication plan
- Your preferences and expectations when working with clients

**D. Project Management and Fees**

Please provide the following:

- Process for managing project, including communications with the JLCC
- Proposed budget necessary to fulfill Scope of Services Requested

**Section IV. Additional Terms**

**A. Reservation of Rights**

- During the evaluation process, the JLCC reserves the right to request additional information or clarifications from proposers. The costs of developing proposals is entirely the responsibility of the vendor and shall not be charged in any manner to the JLCC.
- The JLCC will review all applications and reserves the right to accept or reject any proposals. The award will be based on a review of the proposals against all evaluation criteria. Each bidding firm will be provided with fair access to information, as requested by email.

**B. External Factors**

- The JLCC reserves the right to withdraw this RFP or terminate the resulting contract within the terms of the engagement letter without penalty.

**C. Proposal Submission**

- Proposals shall be delivered to the JLCC Treasurer as referred in Section II.
- The JLCC Treasurer will confirm receipt of the proposal via email, by means of replying to the same email address from which the proposal is submitted. Under no circumstances will the JLCC be held responsible for late proposals.
- Proposals received after the RFP Submission Deadline shall not be considered.
- In order to be fair to all proponents, late submission and phone calls or emails to discuss the Proposal's status will not be accepted. Only shortlisted Proponents (contractors/firms) will be contacted.



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**Section V. Proposal Evaluation**

A. The evaluation of the Proposals received will be conducted by the JLCC's Board.

Criteria for evaluation includes

- Complete proposal provided, in compliance with the mandatory requirements of this RFP
- Strength of proposal (firm's qualification, firm's approach)
- Expertise of the Accounting Firm
- Ability to communicate in a timely and efficient manner (via email, phone, etc.)
- Ability to accommodate timelines
- Proposed Fee
- Any additional terms or conditions to which the parties may agree