



**REQUEST FOR PROPOSAL (RFP)
For CPA Services
May 15, 2023**

A. Overview

PCI Media Inc. (“PCI”) is seeking a Certified Public Accountant (“CPA”) firm to perform annual audit and assurance services, annual tax preparation services, and management consulting services for a three-year period for the fiscal years 2022 (January 1, 2022 - December 31, 2022), 2023 (January 1, 2023 – December 31, 2023) and 2024 (January 1, 2024 – December 31, 2024).

PCI invites CPA firms, meeting the qualifications described below, to submit a proposal for consideration.

B. Submission Period

PCI will accept written proposals from May 15, 2023, through and including June 16, 2023. Proposals will not be accepted after the deadline of midnight (12:00am) on June 16, 2023.

C. PCI - Background

PCI is an independent nonprofit corporation with tax-exempt status under Section 501(c)(3) of the Internal Revenue Code.

PCI’s revenue stems from various sources, including restricted and unrestricted funding. Funding sources include but are not limited to governments, bilateral organizations, and international non-governmental organizations (NGOs).

PCI partners with communities and organizations, often in low and middle income and high-risk economies, globally to create culturally resonant entertainment-education programs and social marketing communication campaigns with an impact.

Through storytelling and creative communications, PCI inspires communities worldwide to act for social justice, health, and the environment. PCI’s environmental, social justice and public health portfolios extend across over 70 countries in 37 languages and reach billions of viewers.

More information regarding PCI and the services provided by PCI can be found on PCI’s website at www.PCI.org.



D. CPA Firm - Qualifications

PCI is seeking a CPA firm which provides a full range of capabilities and specialized expertise including, but not limited to, audit and assurance, tax and accounting services, business advisory services, and has a long-standing reputation of integrity, independence, objectivity, and professional excellence.

The firm must demonstrate that all engagements are conducted in accordance with auditing standards accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States.

All firm partners and managers shall demonstrate expertise and experience in audits, reviews, compilation of financial statements as well as tax returns for corporate clients, including exempt organizations.

Additionally, the firm should possess experience with risk management advisory services, grant, and donor management as well as compliance matters both domestically and internationally.

E. Services Required

PCI is seeking a CPA firm that has experience working with international nonprofit organizations.

1. At the conclusion of annual audits, the following published reports or information returns are required:
 - a. Independent auditor's report
 - b. Financial statements including footnotes and any relevant schedules
 - c. Schedule of expenditures, awards, grants, donations
 - d. Independent auditor's report on internal controls, risk management mitigations, compliance with other matters based on annual audit of financial statements
 - e. Schedule of findings and material weaknesses
 - f. Schedule of prior year recommendations and progress
 - g. Internal Revenue Service Form 990 and related schedules
 - h. Any other state, federal, or governmental specific forms as required



2. The desired audit schedule for the fiscal year ending December 31, 2022 (January 1, 2022 - December 31, 2022):
 - a. Books closed and trial balances (PCI responsibility)
 - b. Draft financial statements, draft 990, and audit reports completed by October 15th
 - c. Present information to Finance, Audit & Investment Committee of the Board of Trustees (FAI) Committee at October 28th meeting
 - d. Final financial statements, 990, and audit reports completed by November 15th
 - e. Please note that in subsequent years, the scheduling of deliverables may change

3. In addition to the above listed deliverables, the following services are required
 - a. Risk management consulting services
 - b. Review of PCI's grant and donor management, tracking, reporting and compliance
 - c. Reports required under all relevant government auditing standards
 - d. Program specific audits as required by donors and funders

F. Information to include in Proposal (See Attachments)

- a. Statement of the firm's understanding of the services to be provided to PCI
- b. The firm's experience and qualifications in working with nonprofit organizations
- c. The firm's organization and qualifications and experience of audit partners, managers, and staff who would be responsible for this engagement
- d. Description of the CPA firm's approach to the audit, including a proposed time schedule
- e. Fees for the audited financial statements, and tax returns
- f. The proposal should contain the maximum fees to be charged during the fiscal year



G. Proposal Preparation

The following information is provided to assist the firm in preparing their proposal:

1. Attachment A: Proposal Writing Guidelines
2. Attachment B: Proposal Title Page
3. Attachment C: Table of Contents & Proposal Requirements
4. Attachment D: Fee Schedule
5. Attachment E: PCI's Audited Financial Statements for the Fiscal Year 2021 – upon request
6. Attachment F: PCI's 990 for the Year Ended December 31, 2021 – upon request

H. CPA Selection Timetable

1. Proposals are due by June 16, 2023
2. Applicant interviews during the week of June 26, 2023 through June 30, 2023
3. Select top two applicants by July 21, 2023
4. Invite top two applicants to present to FAI Committee on or around July 31, 2023
5. The CPA firm selected should be ready to provide services beginning August 14, 2023

I. Submission of Proposals - Email

Proposals must be emailed to PCI as follows: jobs@pcimedia.org



J. Evaluation Criteria

Each proposal shall be organized into the following five (5) sections, which are described in Attachment C, Table of Contents and Proposal Requirements.

Each section will receive a maximum score as follows:

Proposal Section	Maximum Score
Experience & qualifications in working with domestic and international nonprofit organizations with diverse funding sources	25
Organizational chart and qualifications and experience of audit partners, managers, and audit staff	15
Client references	15
Description of approach to audits, including a proposed time schedule	25
Fees for audited financial statements, tax preparation, other required services	20
Total Maximum Points	100

The FAI Committee will use the above criteria to rate proposals submitted by each firm.

K. Eligible Applicants

All CPA firms meeting the qualifications as identified in the RFP are eligible to apply.

L. Selection Procedures

All proposals will be reviewed for timeliness, completeness, experience, qualifications, reasonableness of costs, and the ability of applicant to provide the identified services required by PCI.



M. Reservation of Rights

PCI reserves the right to request or negotiate changes in a proposal, to accept all or part of a proposal or to reject any or all proposals. PCI may, at its sole and absolute discretion, select no firm for these services, if, in its determination, no applicant sufficiently meets the service need. PCI reserves the right to withdraw this RFP and/or any item within the RFP at any time without notice. PCI reserves the right to disqualify any proposal which does not adhere to the RFP guidelines.

This RFP is being offered at the discretion of PCI and does not commit PCI to award services.

N. Costs for Proposal Submission

Applicants responding to the RFP shall bear all costs associated with the development and submission of a proposal.

O. Inquiries/Request for Assistance

All additional inquiries regarding the application or requesting technical assistance should be directed to jobs@pcimedia.org. All questions must be submitted by May 31, 2023.



ATTACHMENT A

RFP - Writing Guidelines

A proposal may be disqualified from consideration for failure to 1) follow instructions; 2) complete documents; 3) provide required documents; or 4) meet the submission deadline. All proposals submitted to PCI must adhere to the following requirements:

1. Use standard size (8 ½ x 11) paper except for special charts, brochures, or schedules that require different size paper.
2. Every page of the proposal must be numbered consecutively.
3. The proposal title page (see Attachment B) must be the first page of the proposal.
4. The proposal must include an executive summary.
5. The proposal must include a table of contents that corresponds to the proposal requirements (see Attachment C).
6. All sections of the table of contents/proposal requirements must be clearly labeled and addressed in the proposal (see Attachment C).
7. As applicable, include appendices for documents, such as resumes, certificates, schedules, letters of recommendation, peer review, etc.



ATTACHMENT B

Proposal Title Page

TO: FAI COMMITTEE

RE: **Submission of Proposal in Response to RFP for a CPA Firm**

NAME OF APPLICANT, ENTITY, ORGANIZATION SUBMITTING PROPOSAL

ADDRESS

CITY
CODE

STATE

ZIP

TELEPHONE NUMBER

CONTACT PERSON FOR PROPOSAL / CONTACT INFORMATION

I affirm that the information presented in this application and proposal is true and that this proposal was developed and authored by authorized individuals of the CPA firm. I understand that any falsification of information; or failure to disclose any information regarding complaints leveled by a regulatory authority; or failure to report a Conflict of Interest, will be cause for immediate disqualification. I also understand that failure to meet minimum qualifications as stated in the RFP, late proposal submissions, and incomplete proposals may result in immediate disqualification. I further understand that, in the event that this proposal is selected by PCI, the proposal itself is not approved conclusively.

Applicant Signature

Date

Printed Name of Applicant



ATTACHMENT C

Table of Contents and Proposal Requirements

1. Proposal Title Page

- a. See Attachment A
- b. Provide the name, address, and contact information of the applicant.
- c. If the applicant is a corporation, list the principal members of the corporation and include verification of incorporation.

2. Executive Summary

- a. Provide an overview of the firm's understanding of the services to be provided to PCI.

3. CPA Firm - Experience and Qualifications in working with Nonprofit Organizations

- a. Provide an overview of the applicant's business, including services provided, business philosophy, business location(s), business hours, number of staff, mission statement, business history, etc.
- b. Detail firm's experience in providing audit and assurance, tax and accounting services, and business advisory services with private, nonprofit organizations.
- c. Discuss the firm's independence with respect to PCI.
- d. Provide at least three (3) references from other similarly sized clients or from clients similar to PCI's organization. Include each reference's contact information, and a statement from the references permitting that references may be contacted by PCI.
- e. Provide any additional information that would assist PCI in making its decision.

4. CPA Firm - Organization and Qualifications and Experience - Staff

- a. Attach an organizational chart showing supervisory hierarchy at firm. The chart must include the names of any governing board members and advisory boards.
- b. Identify the partner, manager, and lead accountant who will be assigned to PCI if firm is successful with bid.
- c. Provide the number of staff that firm employs.
- d. Provide biographies, licenses, job descriptions, and qualifications for the primary audit partners, managers, and in-charge accountant positions.
- e. Provide information regarding any complaints filed against the firm or its employees that have been leveled by any regulatory authority, if any. Indicate any corrective actions that have been taken by the firm with respect to these individuals, if any.



5. CPA Firm - Approach to Audits

- a. Describe how your firm will approach the audit, including the use of any association or affiliate member firm.
- b. Discuss the communication process used by the firm to discuss issues with PCI's management and PCI's FAI Committee.
- c. Discuss how the firm would work with PCI to resolve an auditing or accounting matter.
- d. Provide a sample of audited financial reports and tax returns completed for other clients.
- e. Provide a sample of the audit protocols typically utilized to ensure compliance with GAAP.



ATTACHMENT D

Fee Schedule

Provide a fee schedule for fiscal year 2022 and as per the requirements stated in this RFP.

Fee schedules should be itemized accordingly. For example, fees stated should be shown for each deliverable including but not limited to:

- a. Audited financial statements
- b. Tax forms (i.e., 990)
- c. Report on internal controls, risk management mitigations, compliance matters
- d. Note any anticipated fee changes from year to year.



ATTACHMENT E

**PCI's Audited Financial Statements for the Fiscal Year ended December 31, 2021
(January 1, 2021 – December 31, 2021)**



ATTACHMENT F

**PCI's 990 for the Fiscal Year ended December 31, 2021
(January 1, 2021 – December 31, 2021)**

