



REQUEST FOR PROPOSAL
(RFP)

FOR AUDIT SERVICES FOR STUHR MUSEUM &
FOUNDATION

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March 20, 2025

REQUEST FOR PROPOSALS (RFP)

The Stuhr Museum & Stuhr Museum Foundation will receive proposals for audit services relating to audit and tax return preparation. Attached is information relating to minimum specifications of services, data to be included in the proposal, evaluation criteria, and selected information relating to the entity to be audited.

Sealed proposals (6 copies) will be accepted until 4:30 p.m., April 30, 2025, at the Stuhr Museum Foundation located in the Reynold's Administration building of Stuhr Museum, 3133 W US HWY 34, Grand Island, NE. If mailed, proposals must be received no later than 4:30 p.m. April 30, 2025, addressed as follows:

Stuhr Museum Foundation
Request for Proposal
3133 W US HWY 34, Suite 2
Grand Island, NE 68801

Those submitting sealed proposals should indicate on the outside of the envelope in the lower left-hand corner that it is a sealed proposal for the RFP indicated above and the name of the firm submitting the proposal.

The latest audited financial statements and 990 are available for each organization upon request.

The contract for services will be awarded by May 30, 2025.

I. INTRODUCTION

Stuhr Museum (SM) and Stuhr Museum Foundation (SMF) are seeking proposals from qualified area accounting professionals (herein referred to as “contractors”) for firms of certified public accountants to provide audit and tax preparation services for the three (3) fiscal years ending June 30, 2025, 2026, and 2027. We are seeking auditing and tax preparation as well as deliverables described in the Scope of Services, below.

Interested firms must have an office and assigned manager located in Hall County with a desire to support the public well-being and improve the quality of life in Central Nebraska.

Term of Engagement

A three (3) year contract is contemplated. Each year shall be subject to the annual review and recommendation of Stuhr Museum and Stuhr Museum Foundation Joint Finance Committee.

Scope of Services

- Auditing and Tax Preparation for SM and SMF
 - Reporting on fair presentation of the consolidated financial statements of SM and SMF in accordance with accounting principles generally accepted in the United States of America.
 - Typically, six (6) copies of the final audit report are required as well as a PDF file.
 - A management letter presented to the SM and SMF Finance Committees with respect to recommendations on internal controls and financial management practices.
 - A letter on significant deficiencies/material weaknesses, if applicable.
 - IRS Form 990 for SM and SMF
 - PDF file of full version and public inspection version provided along with hard copies of the completed tax forms

II. MISSION & ORGANIZATIONAL STATUS

The mission of the Stuhr Museum Foundation is to raise unrestricted funds, special project funds, and endowment funds to benefit the living history, education, and preservation programs of the Stuhr Museum. The Stuhr Museum Foundation is a functionally integrated nonprofit corporation under IRC section 501(c)(3) subsection 509(a)(3).

The mission of the Stuhr Museum is to share the collective human experience of community building along the Platte River Valley. The Stuhr Museum is a quasi-government organization qualified under IRC section 501(c)(3).

III. SPECIFIC REQUIREMENTS

1. SM and SMF reserve the right to reject any proposal received.
2. Only proposals received at the location described and, in the timeframe given, will be considered.
3. The audit shall be performed in accordance with Generally Accepted Accounting Practice GAAP & Generally Accepted Auditing Standards GAAS.
4. The fees quoted in your proposal and included in the contract will be the maximum paid in total unless an amendment to the contract is completed by both parties.
5. The audit report should conform to AICPA audit Guides and be received in final format no later than October 1st each year.
6. The audit report should include a management letter, if appropriate, which includes recommendations related to the financial statements, internal control, and accounting systems.
7. A representative of the audit firm will attend the respective October Board meeting of SM and SMF to present the final audit and answer any questions that may arise.
8. Bound copies of the report, including a management letter, in a quantity sufficient to meet the needs of SM and SMF as well as electronic format are required to be provided by the firm awarded the contract.

IV. REQUESTED INFORMATION

SM and SMF Joint Finance Committee requests that all proposals include the following information in a written proposal:

SECTION A – ORGANIZATIONAL PROFILE

1. Please provide the full name of your organization, address, telephone and facsimile number and email of your main office. Proposals will only be accepted from firms with an office and assigned manager located in Hall County.
2. Please identify the key contact person(s) for all inquiries and communications regarding the selection process and include a title, address, telephone and facsimile number and email address for each person.
3. Briefly describe your organization including, but not limited to, the year it was founded, its history, its ownership structure, and its primary focus.
4. Please disclose all conflicts of interest your organization has in serving SM and SMF.
5. Describe any material litigation, regulatory or legal proceedings in which you're firm, or any of its principals, is or has been involved over the past five years.

SECTION B – CLIENT AND REFERENCE INFORMATION

1. Please describe your client base including types of clients served, the number of foundations or endowments for which your organization currently provides services, the length of time of services, and range of asset values among your clients.
2. Please provide three client references that most closely relate to SM and SMF including the name, address, telephone number, title of the contact, and length of services.

SECTION C – PREPARATION INSTRUCTIONS

To simplify the review process and to obtain the maximum degree of comparability, the proposal should include the following items and be organized in the manner specified below.

A. Letter of Transmittal

A letter of transmittal briefly outlining the proposer's understanding of the work and general information regarding the firm and individuals to be involved is permitted, but not required, if it is limited to not more than two pages. If a transmittal letter is presented, it should clearly set forth the primary or local address of the office of the firm to be performing the work, the telephone number, and the name of the contact person.

B. Table of Contents

Include a table of contents which identifies the material by section, page number and a reference to the following information to be contained in the proposal. If a transmittal letter is not submitted, please include on the table of contents the primary or local address of the office to be performing the work, the telephone number, and the name of the contact person.

C. Profile of Firm Proposing

1. State whether the firm is in current compliance with the registration requirements to engage in the practice of public accounting in Nebraska.
2. Describe the primary or local office from which the work is to be performed.
 - a. Location of the office.
 - b. Size of professional staff by level, such as partner, manager, and senior, and other professional staff.
 - c. Number of certified public accountants in the office.
3. Submit any other information required to describe the office which will be performing the work.

D. Qualifications

1. Describe recent local or regional non-profit auditing experience to which the proposal relates. Please list up to three references we may contact.

2. Include resumes of all key professional members who will be assigned to the audit. Resumes should be included for all members of the audit team from the audit partner through at least the on-site in-charge accountant. The resumes should include:
 - a. amount of experience the individual has in the auditing profession.
 - b. summary of similar nonprofit audits on which the individual has worked.

E. Scope of Services and Proposed Project Schedule

Briefly describe your understanding of the scope of services to be provided. Indicate proposed time schedule for completing the work assuming the contract will be issued on the date given in the cover letter. Include the approximate dates you would perform field work, office review, and report preparation and the latest delivery date of the final report.

SECTION D – FEES

1. Please describe all fees proposed by your organization for providing proposed
2. Describe the frequency and timing of your fee arrangements.
3. Estimated total hours
4. All-inclusive maximum fee and out-of-pocket expenses, which will not be exceeded.
5. Frequency and timing of your billing process.

SECTION E – OTHER

1. Describe the ways in which your firm has supported or partnered with SM and SMF in the past or plans to in the future.
2. Describe your firm's commitment to and participation in the greater Hall County and Nebraska communities.
3. What do you believe sets your organization's services apart from the competition and what unique value-added services could your organization provide?

VI. EVALUATION CRITERIA

The proposal will be evaluated based upon the following two areas. Therefore, it is important that your proposal be responsive to the data requested.

1. Cost
Overall cost, including out-of-pocket expenses for performance of the audit.

2. Qualifications
 - a. Organizational structure and size of the office performing the audit.
 - b. Recent experience in similar nonprofit audits.
 - c. Qualifications of the audit team.
 - d. Individuals with whom the audit team can consult.
 - e. Understanding of work and timetable to complete the audit.

REQUEST FOR PROPOSAL SUBMISSION

Please check all proposals prior to submitting for all required information.

One original and six copies of completed, sealed proposal packages are to be delivered to Stuhr Museum Foundation, Request for Proposal, 3133 W. Highway 34, Grand Island, NE 68801. By mail: Stuhr Museum Foundation, 3133 W. Highway 34 Ste 2, Grand Island, NE 68801-7484. No faxes or e-mails are permitted. **Proposal packages will be time & date-stamped and must be received by 4:30 PM on Wednesday, April 30, 2025.**

The Stuhr Museum and Stuhr Museum Foundation Joint Finance Committee will review proposals, and the selection will be announced no later than May 30, 2025.