



Request for Proposals (RFP)

Independent Audit, Single Audit, IRS Form 990 Preparation, and Tax Services

Issued By:

Choice in Aging

RFP Issue Date: 07/14/2026

Proposal Due Date: 07/30/2026

Primary Contact:

Biruk Weldhana, Controller

Choice in Aging

490 Golf Club Road

Pleasant Hill, CA 94523

Phone: (925) 682-6330

Email: bweldhana@choiceinaging.org

Introduction

Choice in Aging (CIA) is a California nonprofit public benefit corporation dedicated to creating opportunities where people can learn, grow, and age independently with dignity in community. For more than 76 years, Choice in Aging has provided innovative community-based programs serving older adults, adults with disabilities, caregivers, and families throughout Contra Costa, Solano, Napa, Sacramento, and surrounding communities.

Choice in Aging invites qualified Certified Public Accounting firms to submit proposals to provide independent auditing and tax services for the fiscal year ending **June 30, 2026**, with the option to renew services annually for up to four additional years, subject to satisfactory performance and mutual agreement.

Scope of Services

The selected firm will provide the following professional services:

Annual Independent Financial Audit

Conduct an independent audit of Choice in Aging's financial statements for the fiscal year ending June 30, 2026, in accordance with:

- Generally Accepted Auditing Standards (GAAS)
- Generally Accepted Accounting Principles (GAAP)
- Government Auditing Standards (Yellow Book)
- Applicable nonprofit auditing standards

Deliverables shall include:

- Audited Financial Statements
 - Independent Auditor's Report
 - Required Communications to the Board of Directors
 - Management Letter, if applicable
 - Presentation of audit results to the Finance Committee and/or Board of Directors
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Single Audit

Conduct the required Single Audit in accordance with:

- Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 200)

Services include:

- Schedule of Expenditures of Federal Awards (SEFA)
 - Compliance testing
 - Internal control testing
 - Federal reporting requirements
 - Submission guidance
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IRS Form 990

Prepare and review:

- IRS Form 990
- California Form 199
- California RRF-1
- Any additional required nonprofit informational filings

Provide draft returns for management review prior to filing.

Tax Consultation

Provide limited consultation throughout the year regarding:

- Accounting and reporting issues
 - Changes in nonprofit tax law
 - Federal funding compliance
 - Financial reporting guidance
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Organizational Information

Choice in Aging is a California nonprofit organization with a diversified funding portfolio that includes:

- Medi-Cal and Managed Care reimbursement
- Federal awards
- State contracts
- County contracts
- Grants
- Contributions
- Private pay revenue

The organization operates multiple programs, including:

- Adult Day Health Care (Community-Based Adult Services)
- Multipurpose Senior Services Program (MSSP)
- California Community Transitions
- Enhanced Case Management
- Behavioral Health Services
- Transportation
- Caregiver Support
- Choice in Learning Montessori Preschool

Choice in Aging anticipates requiring a Single Audit based on federal expenditures.

Additional organizational information, audited financial statements, and financial reports will be provided upon request.

Proposal Requirements

Please include the following information:

Firm Qualifications

- History of the firm
 - Size of the firm
 - Office location(s)
 - Years providing nonprofit audit services
 - Any characteristics that make your firm stand out, such as designations (DBE, Woman-owned, etc.) and awards
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Nonprofit Experience

Describe your experience with:

- Nonprofit organizations
- Healthcare organizations
- Community-Based Adult Services (CBAS)
- Federally funded organizations
- Single Audits
- Government-funded nonprofits

Include examples of similar clients.

Audit Team

Identify:

- Engagement Partner
- Audit Manager
- Senior Auditor
- Other assigned staff

Include qualifications and nonprofit experience.

Audit Approach

Describe your approach to:

- Planning
- Internal controls
- Risk assessment
- Communication
- Timeline

- Deliverables
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Technology

Describe:

- Secure document sharing
 - Electronic workpapers
 - Remote audit capabilities
 - Cybersecurity practices
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Independence

Provide a statement confirming independence in accordance with applicable professional standards.

References

Provide at least three nonprofit clients similar in size and complexity, including:

- Organization name
 - Contact person
 - Title
 - Phone number
 - Email address
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Pricing

Provide a fixed fee proposal for:

- Annual Financial Audit (Draft due Feb 28th 2027, Final filed by March 30, 2027)
- Single Audit (Draft due Feb 28th 2027, Final filed by March 30, 2027)
- Form 990 Preparation (First week of May 2027)
- California filings
- Board presentation
- Hourly rates for additional consulting services

Please identify any anticipated out-of-pocket expenses.

Evaluation Criteria

Proposals will be evaluated based on:

- Demonstrated nonprofit audit experience and years in business
- Experience conducting Single Audits
- Experience with healthcare and government-funded organizations
- Qualifications of the proposed engagement team
- Audit approach and communication style
- References
- Responsiveness to the RFP
- Cost and overall value
- Ownership - MBE, Woman-owned, Veteran-owned or similar structures

Choice in Aging reserves the right to interview finalist firms prior to selection.

Tentative Schedule

Activity	Date
RFP Issued	07/14/2026
Questions Due	07/21/2026
Responses Issued	07/24/2026
Proposal Deadline	07/30/2026
Interviews (if needed)	07/31/2026 – 08/05/2026
Selection	07/31/2026 if there is a clear selection, 08/07/2026 if not
Audit Planning Begins	Fall 2026

Terms and Conditions

Choice in Aging reserves the right to:

- Reject any or all proposals.
- Waive informalities in proposals.
- Request additional information.
- Negotiate scope or pricing with the selected firm.
- Cancel or reissue this RFP at its discretion.

Issuance of this RFP does not obligate Choice in Aging to award a contract or reimburse respondents for proposal preparation costs.

Proposal Submission

Please submit proposals electronically in PDF format to:

Biruk Weldhana, Controller

Choice in Aging

bweldhana@choiceinaging.org

Questions regarding this RFP should be directed to the contact listed above.

About Choice in Aging

Choice in Aging is one of Northern California's leading nonprofit providers of community-based services for older adults and adults with disabilities. Through innovative programs, strong public-private partnerships, and a commitment to dignity, independence, and inclusion, the organization helps thousands of individuals each year remain healthy, connected, and living in the communities they call home.