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## REQUEST FOR PROPOSAL FOR NONPROFIT AUDIT AND TAX PREPARATION SERVICES

*February 2, 2026*

The Rose Foundation for Communities and the Environment requests a proposal for the annual audit of its consolidated financial statements and preparation of state and federal information tax returns for the fiscal year ending December 31, 2025.

### **Background and Entity Description**

Rose Foundation is a nonprofit entity incorporated in California, with employees and program activities in multiple states. Its federal income tax exemption status was issued under Section 501(c)(3) of the Internal Revenue Code. The Rose Foundation is further determined to not be a private foundation as defined in 509(a) of the Internal Revenue Code.

### **Organizational description**

A seven-member Board of Directors governs Rose Foundation. The Board's Audit Committee will approve the auditor selection; the RFP process is managed by the Executive Director. Rose Foundation has approximately \$27 million in assets, with annual expenses of approximately \$12M, about \$10M of which is recognized through grantmaking. Rose's primary revenue sources are pollution mitigation settlement funds that are re-granted by Rose, Donor Advised Fund contributions, several Model C fiscal sponsorships and about a dozen private and government grants supporting a youth leadership program. In 2025, expenditures of federal funds by Rose in 2025 (and previous years) did not exceed the threshold for a single audit; however, in 2025, the organization received a \$3.1M 3-year subaward from a \$300M EPA grant to the Port of Oakland. Rose Foundation employs 12 full-time staff in two states.

### **Expected Deliverables and Timeline**

The selected auditor or CPA firm will be expected to do the following:

1. Conduct an audit of Rose Foundation's records, internal controls, and financial statements in accordance with auditing standards generally accepted in the United States of America.
2. Communicate with Rose staff and the Audit Committee as appropriate, before, during, and after audit fieldwork.
3. Complete a discussion draft of the audited financial statements report by August 15 and provide a final report to the Audit Committee by August 31.
4. File for the 6-month extension of the tax filing deadline.
5. Complete a first draft of all required tax filings by October 31, to provide time for Rose to review and approve the tax filings prior to filing on November 15.
6. Include in the final invoice the cost to be allocated to an EPA subrecipient award through the Port of Oakland.



### CPA Firm's Technical Qualifications

The CPA firm shall include the following information in its proposal:

1. **Prior Auditing/Tax Experience:** CPA firm must describe its prior auditing experience with nonprofits of similar size and complexity, including those with Donor Advised Funds and other re-granting models. Experience conducting Single Audits and knowledge of OMB Uniform Guidance and California-specific tax and charitable filing requirements is essential. Though this will not be a single audit, we want to be certain we are in good shape for any future subrecipient audit of the Port of Oakland's federal EPA grant. The CPA firm should include with its proposal a representative sample of prior or current nonprofit clients and representative references.
2. **Organization, Size, and Structure:** CPA firm should describe its organization, leadership composition, and structure. CPA firm should include a copy of its most recent Peer Review Report and any other supporting documents.
3. **Staff Qualifications:** Descriptions should include audit and tax team makeup; overall supervision to be exercised; and, prior experience of the individual team members.
4. **Understanding of Work to be Performed:** CPA firm should describe its understanding of work to be performed and other pertinent information representing its approach and plan for the audit and tax work. Evidence that the firm is mission-aligned will be appreciated.

### Proposal Evaluation and Submission

Factors determining the selection of the awardee of the contract will include but not be limited to the above-mentioned technical qualifications, price, references, and responsiveness to the RFP.

Only licensed Certified Public Accountants or firms may respond to this RFP. Rose Foundation reserves the right to reject all proposals or request additional information from one or more proposers. All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the proposer and will not be reimbursed by Rose Foundation.

Rose Foundation's 2024 financial statements and tax returns are available upon request.

The deadline for proposal submission is **Monday, March 2, 2026 by 5 pm Pacific Time**. Submit proposal and any questions to Deb Self, Executive Director, and Pamela Arauz, Director of Finance via email at [dself@rosefdn.org](mailto:dself@rosefdn.org) and [parauz@rosefdn.org](mailto:parauz@rosefdn.org) respectively.