

Request for Proposals

Audit & Tax Services

For fiscal year ending 6/30/2026 with 2 additional option years

RFP Release Date:

November 17, 2025

Proposal Deadline:

January 9, 2026 at 11:59pm ET

Partner4Work
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1. General Information

This section provides the general and background information needed to understand the purpose and context of this RFP. It also describes important details regarding the services and stakeholders related to this RFP, as well as basic characteristics of any agreements that may result from this RFP.

About Partner4Work

TRWIB, Inc. (dba "Partner4Work") is the workforce development organization that connects funding, expertise, and opportunities to develop a thriving workforce in Pittsburgh and Allegheny County. With a budget of more than \$25 million in public and private workforce funds, Partner4Work delivers a comprehensive portfolio of programs and initiatives for adults and youth to ensure that current and future needs of employers, job seekers, and underemployed workers are met.

TRWIB, Inc. (Partner4Work) was incorporated as a 501(c) (3) not-for-profit corporation on November 16, 2001, and serves as the operations and fiscal agent for Workforce Innovation and Opportunity Act formula funds allocated to the City of Pittsburgh and Allegheny County. It is also the fiscal agent and operations manager for USDOL grants and has responsibilities in administering and/or monitoring federal and state grants awarded to Partner4Work. In addition, it is the recipient of several local and national foundation grants.

Purpose of this RFP

Partner4Work seeks proposals for audit and tax services, including a Single Audit, and AUP for the fiscal year ending June 30, 2026, with the option to renew for 2 years. Respondents must be qualified firms of Certified Public Accountants and meet the standards of the Government Accounting Office Standards for audit of governmental organizations.

Proposals must cover the following services:

1. Annual audit to be completed and meetings with the audit committee and/or board of directors, as necessary.
2. Tax filings for the organization and related foundation.
3. Management letter
4. AUP services for our EARN/WR program
5. Presentation of audit to the Partner4Work Audit/Finance Committee

These services have been provided by MaherDuessel for the fiscal years ending June 30, 2023, through June 30, 2025. Copies of the current audit and 990 are available upon request. Partner4Work will not reimburse responding firms for any expenses incurred in responding to this request. Submission of a proposal indicates acceptance by the firm of the conditions contained in this specification. By submitting a proposal, interested firms will be granting Partner4Work the right to request additional information or clarifications from proposers, or to allow corrections of errors or omissions and to direct inquiries to clients of the proposers and others who may be able to aid in the evaluation of a proposer's capabilities.

Anticipated Awards

As a result of this RFP, Partner4Work expects to select one firm to perform the services sought. The actual amount of award will be based on proposed pricing, contract discussions, availability of funds, and standards for the use of public funds. Partner4Work reserves the right to vary or change the terms of any contract executed as a result of this RFP, including funding levels, the scope of work, and shortening or extending the contract period, as it deems necessary and in the best interests of Partner4Work.

The Stevens Amendment, Public Law 101-166, Section 511, is an appropriations provision that requires grantees of the Department of Labor (DOL), Health and Human Services (HHS), and Education to disclose for a grant program the percent of the costs financed with federal funds.

- Any agreement for audit and tax services resulting from this RFP will be funded 100% through management & general funding.
- AUP work for the EARN and Work Ready programs will be funded 100% by federal grants from the U.S. Department of Health and Human Services (HHS) through the Pennsylvania Department of Human Services (PADHS) using Temporary Assistance for Needy Families (TANF) funds as part of an award to Partner4Work totaling \$6,743,273, and by federal grants from the U.S. Department of Agriculture (USDA) through PADHS using Supplemental Nutrition Assistance Program (SNAP) funds as part of an award to Partner4Work totaling \$70,764.

Period of Performance

The services sought by this RFP will be initially performed by the successful bidder for the fiscal year ending June 30, 2026. Partner4Work reserves the option to renew the services for an additional two years beyond the initial period of performance, based on the full discretion of Partner4Work. Partner4Work also reserves the option to modify contracts on a year-to-year basis.

Disclaimers

- Executive Order 2021-06, Worker Protection and Investment must be followed throughout this RFP.
- This Request for Proposals (RFP) does not commit Partner4Work to award a contract.
- Partner4Work may select a firm based on its initial proposal received, without discussion of the proposal. Accordingly, each proposal should be submitted on the most favorable terms, from a price and technical standpoint, that the bidder can submit to Partner4Work. Partner4Work may, however, have discussions with those firms it deems in its discretion to fall within a competitive range.
- Partner4Work reserves the right to request additional information from any applicant, request oral presentations from applicants, or conduct site visits from any applicant before a contract award.
- Partner4Work reserves the right to fund portions of a proposal, or to reject any and all proposals in whole or in part. Rejection of a portion of a proposal does not necessarily negate the entire proposal.
- Partner4Work may, at its discretion, adjust the level of funding provided to successful bidders under this RFP and/or consider the funding of proposals not initially funded under this RFP at a later date.
- No costs will be paid to cover the expense of preparing a proposal or procuring a contract for services or supplies.
- All data, material, and documentation originated and prepared by the bidder pursuant to the contract shall belong exclusively to Partner4Work and be subject to disclosure under the Freedom of Information Act, Right to Know Law, or other applicable legislation.
- The contract award will not be final until Partner4Work and the successful bidder have executed a mutually satisfactory contractual agreement.
- No activity may begin prior to final Partner4Work approval of the award and execution of a contractual agreement between the successful bidder and Partner4Work.
- The submission of the proposal warrants that the costs quoted for services in response to the RFP are not in excess of those that would be charged to any other individual for the same services performed by the bidder.
- Applicants are advised that most documents in the possession of Partner4Work are considered public records and subject to disclosure.

- Partner4Work reserves the right to issue additional RFPs if and when it is in Partner4Work's best interest to do so and, may elect to negotiate and issue multi-year contracts to successful bidders under this or subsequent RFPs.
- All programs and activities are designated as equal opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities. Contact staff to request assistance with access to this RFP.
- Applicants must be capable of agreeing to the requirements set forth in the Partner4Work contract templates, available at <https://www.partner4work.org/document/partner4work-contract-templates/>

2. Scope of Work

This section describes the roles and responsibilities of the successful bidder, referred to as “CONTRACTOR” below, to be included in any contract resulting from this RFP. Partner4Work has applied its best efforts to create an accurate description of work in this section; however, the final SOW for an awarded proposal may vary, based on bidder proposals and discussions, or other factors at the discretion of Partner4Work.

The CONTRACTOR will:

1. Audit Partner4Work financial statements;
2. Assess and advise on compliance with Uniform Guidance;
3. Prepare the Single Audit for Partner4Work’s federally funded programs including, but not limited to WIOA, TANF, state, local, and county expenditures;
4. Prepare and submit audit of Partner4Work’s financial statements as well as the Single Audit and Management Discussion Letter to Federal Clearinghouse;
5. Facilitate review and coordinate entrance and exit conferences with Partner4Work to discuss any audit findings and responses prior to issuance of the final audit report;
6. Prepare 990 corporate tax returns;
7. Prepare Agreed Upon Procedures as required for EARN/WR program;
8. Provide general ledger accounting technical assistance during the Single Audit and audit of Partner4Work’s financial statements;
9. Present audited financial statements to the Finance Committee and Board of Directors;
10. Provide guidance throughout the year on an as needed basis.

3. Proposal Requirements and Process

This section provides instructions for preparing and submitting a proposal in response to this RFP, including required proposal content and format, important dates and deadlines, and how to find out more about the RFP. Before preparing and submitting a proposal, interested and qualified applicants are highly encouraged to read all other sections of this RFP and key source documents referenced throughout to gain a full understanding of the services requested and respondent characteristics and competencies sought.

Proposer Requirements

Respondents must meet the following standards to submit a proposal:

1. Be a CPA firm licensed to practice in the Commonwealth of Pennsylvania;
2. Be independent of Partner4Work;
3. Have completed an independent quality review;
4. Stipulate that the scope of services is understood and accepted;
5. Have relevant experience auditing government grants;
6. Be able to meet with Partner4Work's Audit/Finance Committee prior to and after the audit;
7. Be able to submit the draft FY26 audit by November 15, 2026 (estimated);
8. Be able to complete the FY26 audit by December 31, 2026 (estimated).

How to Apply

Interested and qualified applicants must submit proposals by January 9, 2026 at 11:59pm ET to RFP@partner4work.org. Emails must have the subject line "Audit Services Proposal [Organization name]." Late or incomplete proposals will not be considered. Lengthy narrative is discouraged; presentations should be brief and concise and not include extraneous or unnecessarily elaborate promotional material. The proposal should be in a .pdf format (zipped if necessary) not exceeding 10 pages in length. Your proposal must contain all the content below in the same general order presented. Strong proposals will demonstrate a full understanding of the requirements described throughout this RFP and establish the capacity and expertise needed to meet the required standards and goals.

1. **Cover Sheet** – Use template provided. (See Partner4Work webpage for this RFP)
2. **Table of Contents** – Clearly identifying the material in the proposal by section and by page number.
3. **Firm Description** – Address the following:

The primary location of the organization from which the work is to be done and the number of partners, managers, supervisors, seniors, and other professional staff employed at the office; Size of the organization; Years in business; History of business; The firm's experience in the conduct of Single Audits, nonprofits and auditing federal and state grants; Identified experience and background working with Workforce Innovation and Opportunity Act (WIOA) regulations and audit requirements; Three non-profit client references including name, title, organization and phone number; A discussion of the firm's independence with respect to Partner4Work; Identification of five largest clients the firm (or office) has lost in the past three years and the reasons. Also discuss, in instances where loss of the client was due to an unresolved auditing or accounting matter, the process of attempting to resolve the issue(s); Affirmation that the firm is a properly licensed certified public accounting or a public accounting firm and that the firm meets the standards of the Government Accounting Office Standards for Audit of Governmental Organizations, Programs, Activities, and Functions. Respondents who fail to affirm that the firm (1) is properly licensed and/or (2) meets the standards will be automatically disqualified.

4. **Audit Team Description** – Address the following:

The specific individuals of the team proposed to conduct the audit, their role, whether they are a CPA, their years of total experience and years of experience devoted to serving nonprofit clients; brief resumes of key personnel; List of current non-profit clients served by the proposed audit team and identify the role, if any, that each member served in those engagements; commitment firm will make to staff continuity, including staff turnover experienced in the last three years. If the proposer does not commit specific individuals for the engagement, the proposer will preclude itself from earning full points for this requirement.

5. **Project & Work Plan** - Address the following:

A plan that includes a brief description of each service/activity that demonstrates the respondent understands the work to be done, including, but not limited to: Proposed strategy/approach and timeline to accomplish the work and objectives outlined in this RFP and the methodology for tracking and meeting project deadlines and reporting monthly hours spent on project activities; A schedule that displays the estimated audit hours by individual; If the hours for an initial audit are expected to be higher, reflect this in the schedule; Dates the audit will begin and end; Assistance expected from Partner4Work staff and/or its external accounting service provider.

6. **Cost/Fee Schedule** – Address the following:

Provide a total fixed amount for all services sought by this RFP, broken down into three periods of performance: the base year, second option year, and third/final option year; any out-of-pocket expenses proposer expects to incur should be detailed; include the hourly compensation rate for providing required services, broken down by personnel, service type, or provided as a blended rate; the estimated number of hours needed to complete the required services outlined above, broken down by service type.

7. **Qualitative Feedback** – Address the following:

Include a list of up to 5 analytical observations you would discuss with the Audit/Finance Committee regarding the Audit, the Notes to the Financial Statements, Supplementary Information and Other Reports.

Review and Selection Process

All proposals received by the submission deadline will be initially reviewed by Partner4Work for completeness and compliance with this RFP. Proposals passing the initial review will be scored by qualified evaluators according to the criteria below, with attention to clarity and quality. High scoring proposals will clearly demonstrate an ability and likelihood to effectively perform the work and meet the standards and objectives of this RFP. Select applicants may be requested to participate in presentations or discussions with proposal evaluators and other Partner4Work staff.

The selected applicant(s) will be invited to negotiate a contract based on the selected proposal(s) and stipulations of the funding source. Final contracts are subject to successful negotiation, availability of funding, and other factors.

Partner4Work intends to select a proposal that, in its sole discretion, represents the best value to Partner4Work, based on cost, technical factors, and other considerations relevant to requirements of this RFP.

Scoring for the required sections of the proposal will be assigned as follows:

Proposal Review Scoring Rubric	
1 & 2. Cover Sheet and Table of Contents	Required, but not directly scored
3. Firm Description	20 points
4. Audit Team Description	25 points
5. Project & Work Plan	25 points
6. Cost/Fee Schedule	25 points

7. Qualitative Feedback	5 points
Total points available	100 points

Review and Selection Timeline

All dates below are subject to change at Partner4Work’s discretion. Timeframes are estimations provided for informational purposes only and may change without notification to bidders.

Release of RFP	November 17, 2025
Due date – all questions regarding this RFP	December 15, 2025, at 11:59pm ET
Estimated responses to submitted questions	December 19, 2025
Due date – proposal submission	January 9, 2026, at 11:59pm ET
Estimated notification of results	March 31, 2026 (pending State approval)

Questions

All questions or requests for additional information regarding this RFP must be made in writing to RFP@partner4work.org by December 15, 2025, at 11:59pm ET. Emails must have the subject line “Audit Services RFP Questions [Organization name].” Answers will be posted publicly at www.partner4work.org. Interested parties are encouraged to check the website frequently for updates. Partner4Work may not answer questions received after the question submission deadline.

Appendix A – RFP Cover Sheet

Name of RFP for this Proposal: Enter text here.

Use title of RFP on Partner4Work Website

Lead Applicant: Enter text here.

A. Contact Information

Organization Name: Enter text here.

Address: Enter text here.

City: Enter text here. State: Enter text here. Zip Code: Enter text here.

Principal Contact Person: Enter text here. Title: Enter text here.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Enter text here.

Fiscal Contact Person: Enter text here. Title: Enter text here.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Enter text here.

Executive Director: Enter text here.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Enter text here.

B. Legal Information

Type of organization (place a check mark (X) in the left column to indicate the type of your organization):

Select	Type of Organization
	For-profit
	Non-profit
	Government
	Educational institution

Please provide your current:

Federal Employer Identification Number ([FEIN](#)): Enter text here.

Unique Entity ID ([UEI](#)): Enter text here.

Commercial and Government Entity ([CAGE](#)): Enter text here.

C. Certifications and Assurances

Please carefully review the below certifications and assurances. Place a check mark (X) in the left column to acknowledge the statements in the right column and complete the signature section to certify your responses.

If your proposal includes partner organizations, please understand that the below certifications and assurances may also apply to each partner. As the lead applicant, your responses should reflect the understanding and acknowledgment of each partner agency.

By submitting this proposal and signing below, I certify and represent to Partner4Work the following:	
Check	Certifications and Assurances
	AUTHORIZATION. The above-named organization is legally authorized to submit this proposal.
	ACCURACY. All submitted proposal materials are true and accurate to the best of my knowledge.
	COMPLIANCE. My organization intends to accept and comply with the terms, conditions, requirements and provisions described in this RFP, if our proposal is selected and we are offered a contract.
	CONTRACT MANAGEMENT. My organization will use Partner4Work’s Contract Management Software for contract negotiation and administration, if our proposal is selected and we are offered a contract.
	CONTRACTOR INTEGRITY. My organization is compliant with the following PA state integrity policy . If not, please submit along with your proposal a written explanation of why such certification cannot be made.
	SYSTEM FOR AWARD MANAGEMENT (SAM). My organization has a valid UEI obtained from the System for Award Management (SAM). If not, I am not aware of any impediment that would prevent my organization from successfully registering.
	RISK ASSESSMENT. Upon request by Partner4Work, my organization can complete a pre-award risk assessment that collects information regarding our organizational experience, overall staffing, subcontracting arrangements (if applicable), complaints or incidents, lawsuits, administrative systems, funding streams, and financial standing.
	INSURANCE. Upon request by Partner4Work, my organization can submit proof of insurance evidencing the types and amounts of insurance necessary to cover the work performed under any agreement resulting from this RFQ, including naming Partner4Work as a certificate holder and additional insured, where appropriate.
	FINANCIAL AUDIT. Upon request by Partner4Work, my organization can submit our most recent financial audits, including a Single Audit (2 CFR 200.501), as applicable, if our proposal is selected and we are offered a contract.
	FORM W-9. Upon request by Partner4Work, my organization can submit a completed Form W-9 (Request for Taxpayer Identification Number and Certification), if our proposal is selected and we are offered a contract.

SIGNATURE REQUIRED ON NEXT PAGE

D. Signature of Authorized Representative

By signing below, I certify that I am legally authorized by the organization named herein to submit this proposal and represent the above certifications and assurances on behalf of the organization named herein. I understand that Partner4Work is relying on this representation to effectively conduct the procurement process and develop any agreements that may result from this RFP.

Name of Authorized Representative: Enter text here.

Title of Authorized Representative: Enter text here.

Phone: Enter text here. Email: Enter text here.

Signature of Authorized Representative:

Date: Enter text here.

