

**FORT CAMPBELL STRONG DEFENSE ALLIANCE  
REQUEST FOR QUALIFICATIONS  
FOR AUDT AND TAX SERVICES FOR THE PERIOD  
JULY 1, 2023 TO JUNE 30, 2024**

Our 501(c)(6) tax exempt organization, Fort Campbell Strong Defense Alliance (FCS), is requesting an audit and tax proposal from several CPA firms with experience providing audit and tax services to not-for-profit organizations.

**A. Overview**

The Fort Campbell Strong Defense Alliance, Inc. was the result of a collaborative planning effort that began in 2015 in response to the inactivation of the 159th Combat Aviation Brigade (CAB) at Fort Campbell in 2014, and in 2015 the 4th Brigade Combat Team was also deactivated resulting in a total loss of 5803 Soldiers from Fort Campbell. This planning initiative was funded by a grant from the Department of Defense Office of Economic Adjustment (OEA).

Fort Campbell Strong Defense Alliance, Inc. is a 501(c)(6) nonprofit organization founded in 2018 with a mission to provide a dedicated, unified voice on addresses all matters of military significance to ensure the region achieves its full economic potential while supporting and partnering with Fort Campbell to embrace our military and their families with enduring economic and workforce opportunities.

In 2019 The Campbell Strong Foundation, Inc was established as a 501(c)(3) nonprofit charity.

Pennyryle Area Development District is the fiscal agent for FCS and they utilize the Accufund accounting software.

Fort Campbell Strong Defense Alliance is designated as a special purpose governmental entity under KRS 65A. Audit requirements can be found in KRS 65A.030.

**B. Audit Timing and Scope**

Our agency requests a bid from your firm to provide:

1. Audited financial statements for the year ending June 30, 2024
2. Preparation of management letter
3. Preparation of IRS Form 990
4. Planning meetings in preparation for audit.
5. Presentation of final audited financial statements and management letter to our Board of Directors, including executive session if requested.
6. Provide guidance on tax exempt status. FCS is seeking guidance on whether to remain a 501 (c)(6) organization or change to a 501 (c)(3) status. Currently FCS exists as a 501 (c)(6); however, a 501 (c)(3) organization was created in 2019 under the Fort Campbell Strong Foundation name.

7. Availability to answer questions throughout the entire year.

We anticipate that we would be prepared for the audit of the fiscal 2024 financial statements to begin fieldwork during the week of July 22, 2024 and would expect the delivery of financial statements and the management letter by December 1, 2024. We would also expect the timely preparation and filing of tax returns.

If you are interested in submitting a proposal, contact Alisha Sutton at (270)886-9484 or [alisha.sutton@ky.gov](mailto:alisha.sutton@ky.gov) and we will make available to you:

- ▶ current financial statements,
- ▶ other documents as requested by you for preparation of a proposal

### **C. Proposal Specifications**

Please provide the following information in your proposal. Since we will be comparing the qualifications of a number of firms, please provide the information in the order requested.

1. Provide a description of your firm. (staff size, number of professionals, industries served, etc.)
2. Describe engagements your firm currently conducts in the not-for-profit sector. Include a list of not-for-profit clients that you believe are comparable to our organization in size, mission focus and complexity. If partners or other employees serve in an advisory/consultative capacity within the not-for-profit sector, please list such positions as well.
3. Describe the level of experience of the individuals who would be assigned to our account.
4. Describe your firm's basic approach to performing an audit and the resulting advantages that will accrue to our agency. Include description of the activities undertaken by your firm to promote/ensure audit quality.
5. Describe the extent to which our organization's personnel will be expected to contribute to the work effort.
6. Describe any existing or potential relationships between your firm and our agency and any employee or officer of the agency that could affect your independence and objectivity because of an actual or perceived conflict of interest.
7. Please include your peer review report with your proposal.

### **D. Scheduling and Staffing of Engagement**

1. Identify the engagement team which would be performing our audit and include a resume of the qualifications and experience for partners, managers and staff.
2. Indicate the expected timing and completion of the audit and the expected delivery of the financial statements and management letter.

### **E. Fees**

1. Provide information regarding your audit and tax fees for this engagement, including the estimated number of hours to be spent by each person and the expected rate per hour of each. Be sure to include out-of-pocket expenses in your fee structure and indicate how these are calculated.
2. Describe whether and how you bill for overruns. State how you manage against overruns and how we can be assured of no “surprise” billings.

**F. Other Proposal Information**

1. Please give any additional information, not specifically requested previously, considered essential to your proposal.

**G. Proposal Deadline**

The deadline for receipt of your proposal submission is March 20, 2024. Documents should be mailed to:

William Hickman  
FCS Chairman  
300 Hammond Drive  
Hopkinsville, KY 42240

No proposals received after this date will be considered. All proposal submissions will be responded to once a decision has been made.

**H. Other Proposal Instructions**

Proposers are expected to examine the specifications and all instructions contained in this invitation for bids. The proposals must be signed by a duly authorized representative.

Consideration may be given to such matters as contractor integrity, record of past performance, and financial and technical resources. Upon request, bidders must be willing to provide information concerning these matters.

For any additional questions or clarifications, please contact Alisha Sutton at (270)886-9484 or [alisha.sutton@ky.gov](mailto:alisha.sutton@ky.gov).