

Ouzinkie Native Corporation

REQUEST FOR PROPOSAL (RFP) Tax & Auditing Services

TAX & AUDITING SERVICES

Ouzinkie Native Corporation
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August 7, 2017

REQUEST FOR PROPOSAL
TAX & AUDITING SERVICES
Anchorage - Alaska

SUBMISSION DEADLINE: September 14, 2017

Questions may be submitted no later than August 31, 2017 to:

RFP Contact Name: Tom Clements, CFO
Telephone Number: 407-921-4815
Email Address: tclements@ouzinkie.com

INTRODUCTION

Ouzinkie Native Corporation (ONC) invites and welcomes proposals for their Tax & Auditing Services and for other accounting services encompassing the traditional scope of work included by CPA firms. Please take the time to carefully read and become familiar with the proposal requirements. All proposals submitted for consideration must be received by the time as specified above under the "SUBMISSION DEADLINE."

Description of Entity:

ONC, a village corporation, was formed in July 1973, as part of the Alaska Native Claims Settlement Act of 1971. In accordance with ANCSA, the federal government returned to Alaska Natives 44 million acres of land and \$962.5 million in exchange for the termination of aboriginal land claims.

Under ANCSA, ONC was given a broad mission to manage an entitlement of 115,200 acres of surface estate land and its share of \$2,036,000, distributed over a ten year period, of the \$962.5 million Alaska Native fund resolved from this settlement. This settlement soon led to the development of 13 regional corporations and approximately 200 village corporations.

Upon formation, ONC had 339 original shareholders, all of Alutiiq descent who lived in the village of Ouzinkie on Spruce Island, or who were originally from the village and lived elsewhere. Each shareholder received 100 shares at incorporation, of which, cannot be sold or traded. Today, there are more than 500 shareholders by way of shares either inherited or gifted.

The bid proposal is being requested for Tax & Auditing Services for ONC, Inc., and its subsidiaries, including Katmai Government Services, LLC, ONC's diversified government contracting entity.

ONC is a dynamic and growing company, currently earning approximately \$130 million in revenue and operating approximately 25 total legal entities in approximately 35 states.

OBJECTIVE

The objective and ultimate goal for this RFP is to identify and obtain tax and auditing services, as well as consulting services (as needed), from a highly-qualified CPA firm for all of the audit and tax requirements of the corporation and its subsidiaries.

PROJECT SCOPE AND SPECIFICATIONS

Project scope and specifications are detailed on an attached document.

SCHEDULED TIMELINE

The following timeline has been established to ensure that our annual audit and tax compliance needs are met, however, the following timeline shall be subject to change when deemed necessary by management.

Annual consolidated audit fieldwork to begin in February-early March each year, with final consolidated audited statements completed by the end of April-early May each year.

Tax services to be provided throughout the appropriate time periods based on ONC's applicable extension/filing deadlines as are customary in the tax services/compliance industry.

PROPOSAL BIDDING REQUIREMENTS

PROJECT PROPOSAL EXPECTATIONS

ONC shall award services to the CPA firm that provides the best services (with consideration of pricing) for the various audit and tax requirements for the corporation. All proposals must contain a cover letter signed by an individual authorized to bind your firm, stating that the proposal is firm for at least one hundred twenty (120) days. ONC reserves the right to reject any or all proposals, waive minor informalities, and accept the proposal deemed to be in the best interest of ONC. ONC shall reserve the right to cancel, suspend, and/or discontinue any proposal at any time it deems necessary or fit without obligation or notice to the proposing bidder/contractor.

DEADLINE TO SUBMIT PROPOSAL

All proposals must be received by ONC no later than September 14, 2017, for consideration in the proposal selection process.

PROPOSAL SELECTION CRITERIA

Only those proposals received by the stated deadline will be considered. All proposals submitted by the deadline will be reviewed and evaluated based upon information provided in the submitted proposal. In addition, consideration will be given to cost and performance projections. Furthermore, the following criteria will be given considerable weight in the proposal selection process:

- Proposals received by the stipulated deadline must be in the correct format.
- Bidder's audit and fieldwork timeline falling within the stated timeline above.

- Bidder's ability to provide and deliver qualified personnel having the knowledge and skills required to effectively and efficiently execute proposed services.
- Overall cost effectiveness of the proposal.

PROPOSAL SUBMISSION FORMAT

The following is a list of information that the Bidder should include in their proposal submission:

Summary of Bidder Background

- Bidder's Name(s)
- Bidder's Address
- Bidder's Contact Information (and preferred method of communication)
- Legal Form of Bidder (e.g. sole proprietor, partnership, corporation)
- Date Bidder's Company Formed
- Description of Bidder's company in terms of size, range and types of services offered and clientele.
- Bidder's principal officers/partners and managers designated for the engagement teams and length of time each individual has performed in his/her field of expertise.
- Size/structure of the your firm, number of employees, states of operations
- Specific experience of the firm in specialized areas, including but not limited to government contracting, ANCSA, federal regulations for government contracting, DCAA, etc.
- Evidence of legal authority (license) to practice in Alaska

Financial Information

- State whether the Bidder or its parent company (if any) has ever filed for bankruptcy or any form of Reorganization under the Bankruptcy Code.
- State whether the Bidder or its parent company (if any) has ever received any sanctions or is currently under investigation by any regulatory or governmental body.
- Describe insurance coverage

Proposed Outcome

- Summary of timeline and work to be completed.

Cost Proposal Summary and Breakdown

- A detailed list of any and all expected costs or expenses related to the proposed project.
- Summary and explanation of any other contributing expenses to the total cost.
- Brief summary of the total cost of the proposal.

References

- Provide at least two references

Bidder agrees that ONC may contact all submitted references to obtain any and all information regarding Bidder's performance.