

Westshore Alliance RFP: Audit services for Westshore Alliance and Westshore District Foundation

A. Introduction

The Westshore Alliance is a 501(c)(6), not-for-profit organization that serves businesses located in and doing business in the Westshore District of Tampa, Florida. The Westshore Alliance was founded in 1983 and represents nearly 350 businesses in the Tampa Bay region. Our mission is to continue the Westshore District's transformation into a premier mixed-use district and cultivate a thriving community for residents and businesses.

The Westshore Alliance serves as the master developer of the Westshore District through a Development of Regional Impact agreement with the City of Tampa and operates the Westshore Special Services District through an agreement with the City of Tampa.

The Westshore Alliance operates the Westshore District Foundation. It is a 501(c)(3) created to improve the Westshore District through public art and community programming.

B. Scope of Work

The Westshore Alliance is seeking written proposals from firms who are willing to provide auditing and tax services for the Westshore Alliance and Westshore District Foundation with an effective date of December 1, 2025, followed by an annual contract for the year starting January 1, 2026, for at least one additional year and up to a 3-year term.

The firm shall work with the Westshore Alliance staff, Officers, and Finance Committee on various aspects of financial reporting for the organization. These include, but are not limited to:

- Annual financial statement audit in accordance with generally accepted accounting principles and regulatory requirements.
- Preparation of IRS Form 990.
- Preparation of any additional IRS or State of Florida forms and reports related to the Westshore Alliance or Westshore District Foundation.
- Management letter.
- Presentation of the annual audit at the March Officers' Breakfast, March Executive Committee meeting and April Board of Directors meeting.
- Be available to respond to questions from Westshore Alliance staff, Officers, and Board members during the year and in response to the audit process.
- Be available to work with our fractional CFO and financial services provider (CliftonLarsonAllen LLP) on gathering materials, records, statements related to the audit, including the adoption of practices to further improve our financial policies, record retention, efficiency, and transparency.

C. Current Operations

The Westshore Alliance has been in a growth period since 2022. In the last three years, we have restructured our membership pricing model, increased benefits for members, and added responsibilities to our portfolio of services for the Westshore District.

Our growth has created challenges. While we have over 10 years of clean audits, there are improvements to be made in our processes and reporting to our Executive Committee, Board of Directors, and public partners at the City of Tampa. We have identified some of these improvements while working with CliftonLarsonAllen LLP (CLA)

as our fractional CFO and financial services consultant, but more can be done. (CLA and their affiliates are ineligible from providing audit services.)

We expect the selected respondent to perform in accordance with generally accepted accounting principles and regulatory requirements. We would appreciate any advice that allows the Westshore Alliance to improve our financial practices, if applicable.

The 2024 Westshore Alliance Form 990 is available upon request. However, respondents can find our Form 990 on [Candid.org](https://www.candid.org).

D. Submission Requirements

- a. Cover Page
 - i. Please include contact name, title, email address, name of your organization, address, and phone number.
- b. Company Information and Past Experience
 - i. Please include a summary of your work with non-profit and not-for-profit organizations.
 - ii. Please include a summary of your work with local government grants, funding or reimbursements to non-profit and not-for-profit organizations.
 - iii. Please include a summary of the team who would engage with the Westshore Alliance for these services.
 - iv. Please include your most recent peer review report.
- c. Services Description
 - i. Please indicate your core services and typical schedule.
 - ii. Do your staff members have experience presenting audits and audit materials to non-profit boards?
- d. Fee Proposal
 - i. Please include your proposed form of compensation, and additional services that may require compensation or reimbursement.
 - ii. Please include costs for any additional services that may require engagement beyond the audit cycle.
- e. Westshore Alliance membership
 - i. Please note current or previous Westshore Alliance membership, or if the company has never been a member of the Westshore Alliance.
 1. The selected respondent must be a member of the Westshore Alliance prior to signing an agreement for services.
- f. References
 - i. Please include three references with a priority placed on non-profit and not-for-profit organizations in Florida and the Tampa Bay region.

E. Proposal Format

- a. Proposals shall be organized in the format listed above.

F. Submission of Proposals and Closing Time

- a. Proposals must be received by Friday, November 7, 2025, at 5:00 PM. Proposals must be in PDF format.
- b. Please submit proposals to:
Michael Maurino, Executive Director
Westshore Alliance
email: maurino@choosewestshore.com **NO PHONE CALLS PLEASE**

G. Proposal Timeline and Evaluation

- a. RFP released October 7, 2025.
- b. Proposals and submissions must be received by November 7, 2025, at 5:00 PM
- c. Selection made by November 12, 2025 by 5 PM
- d. Anticipated contract award by November 19, 2025
- e. Commencement of contract by December 1, 2025
- f. Proposal Evaluation:
 - i. The Westshore Alliance will evaluate all proposals with the intention of retaining cost effective service relative to the scope of services provided by each respondent, including consultation with our Legal Counsel as to the roles and responsibilities of each party.
 - ii. Respondents may be asked to participate in follow-up calls prior to the selection of proposals.

H. Solicitation Terms

- a. Agreement
 - i. The Westshore Alliance intends to retain the awarded proposal for services when needed, and maintain the agreement, unless circumstances change, and it becomes not viable to maintain the agreement.
- b. Discretion
 - i. The Westshore Alliance, at its sole discretion, may choose not to issue any agreement with any respondent.
 - ii. The direct family members of Westshore Alliance staff and Officers are ineligible from responding to this RFP.
- c. Offers/Quotations
 - i. Quotes must be inclusive of all costs, including taxes and fees. Quotes must remain valid for up to 90 days after submission.
- d. Proposal Costs
 - i. There is no reimbursement for costs associated with these submissions.
- e. Termination
 - i. Either party may terminate the agreement with 90-days advance notice.