

Housing Authority of the City of Milton Florida
5668 Byrom Street
Milton, FL 32570
850-623-8216

IPA AUDIT SPECIFICATIONS

The Housing Authority of the City of Milton Florida, hereinafter referred to as “MHA”, is seeking written, sealed proposals with detailed costs for comprehensive auditing services for all Federal, State and local programs administered by MHA. This is an audit for the Housing Authority of the City of Milton Florida. The Authority maintains the following programs:

Public Housing Program. The Authority operates 39 public housing units. As part of its housing program MHA receives Capital Fund grant awards each year.

Section 8 Housing Choice Voucher (HCV) Program. MHA manages 348 HCV vouchers.

TBRA. Under a state grant from Florida Housing Finance Corporation and in cooperation with the Santa Rosa County School District MHA provides tenant based rental assistance to homeless families with children enrolled in school.

FSS Program. MHA maintains a Family Self Sufficiency Program for Section 8 (HCV) participants.

Property Management. MHA manages a 50 unit apartment complex in Milton Florida which houses only elderly and disabled individuals.

Requirements

All firms submitting proposals must be Certified Public Accountants properly licensed in the State of Florida. It is expected that the audit services will be performed in accordance with Generally Accepted Governmental Auditing Standards (GAGAS). The audit also must meet all requirements set forth in Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance), or any successor issuance, and/or any HUD Requirements, which are in effect as of the date of the audit onsite fieldwork. The auditor will submit to the agency one (1) original unbound, one (1) electronic and 7 bound copies of the audited financial statements.

The firm must execute an audit contract or engagement letter with MHA in a form acceptable to MHA. This is for the audit period beginning April 1, 2022 and ending March 31, 2023. It is expected that the audit be completed and reports be submitted to REAC and the Federal Audit Clearinghouse no later than the federal deadline of December 31, 2023.

Terms and Conditions

This Agreement shall continue in effect for one year. This agreement shall be in effect for a one (1) year term, renewable for an additional four year term at the sole discretion of MHA and as permitted by law, providing the "Contractor's" terms and conditions remain the same. MHA reserves the right to terminate the contract for unsatisfactory performance or any other justifiable cause, i.e. loss or reduction in availability of funding. At any given time during the contract period, upon mutual agreement of both parties and by providing a forty-five (45) day written notice, this contract may be terminated.

The contractor shall audit the accounts and records of MHA for the period beginning April 1, 2022 and ending March 31, 2023 in accordance with Government Auditing Standards, OMB Uniform Guidance, general statutes, and the most recent applicable GASB rules. The audit shall be sufficient in scope to enable the firm to express an opinion in the audit report on the financial statement of MHA and include reports on internal control and major federal program compliance (as required by OMB Uniform Guidance). The contractor shall prepare the financial statements and appropriate notes to be reviewed by MHA. The contractor shall provide MHA with a draft copy of the audit report for review and discussion before issuance and an electronic copy of the audit report in either Word or Adobe PDF format.

The books of accounts and records to be audited are maintained at MHA's main office located at 5668 Byrom Street, Milton, FL 32570. These books and records will be made available to the contractor during normal business hours. The Agency's financial records are maintained on Sage 50 software system. The Agency utilizes SACS software for Public Housing and Section 8 Tenant Application, Tenant Processing, Tenant Accounts Receivable, Work Orders, Waiting Lists, Asset Depreciation and Maintenance inventory. The Agency does not utilize the services of a fee accountant. Additional information about the agency can be obtained from our website: miltonhousing.org
Upon completion of the audit, an audit report will be issued containing all elements required by Government Accounting Standards, OMB Uniform Guidance, and the U.S. Department of Housing and Urban Development. The report will be issued within nine (9) months of the fiscal year end.

The firm will be required to assist MHA at its location with all submissions of audited financial statements, via the Internet to REAC and the "Agreed Upon Procedures" engagement at the conclusion of the audit.

MHA reserves the right to reject any or all bids and to waive any informalities in the bid process. Withdrawal of bids prior and subsequent to the opening shall be permitted only in accordance with MHA's Procurement Policy, Section III.C. 4a & 4b.

The bidder shall protect, defend, indemnify, and save harmless MHA against any or all claims that may result or arise from the performance of this contract.

The bidder shall be required to abide by all Federal, State and/or local regulations with regard to equal employment opportunity.

In order to comply with the law and provisions of the Immigration and Reform and Control Act of 1986, the vendor must verify that all its employees are United States citizens or aliens authorized to work in the United States.

Proposal Format

The Agency intends to retain the successful offeror pursuant to a “Best Value” basis, not a “Lowest Bid” basis, i.e., the Agency will consider other factors than cost in making the award decision. All proposals submitted in response to this RFP must be formatted in accordance with the sequence and instructions provided below. Any proposal which fails to include all of these items will be considered a non-responsive proposal and will not be considered for evaluation.

Title Page. The title page should include the proposal subject, the firm’s name, address, phone, and fax numbers, email address and contact person, date of the proposal, Federal ID number of the firm, and firm’s license number with the State Board of Accountancy.

Knowledge and Experience (Maximum Page Limit: 5 Pages). This section should provide information on the size of the firm, experience with auditing public housing authorities and HUD program regulations.

References. Provide no more than five (5) references of housing authorities currently under contract with the firm or clients served within the past three (3) years for whom the offeror has performed similar services to those described in the RFP. The list shall include the: client’s name, client’s contact name, client’s telephone number, the date the service(s) was provided, and a brief narrative description and scope of the service(s), including key personnel and contract value.

The firm shall provide information on the results of any HUD QASS review, other federal or state desk reviews or field review of its audits during the past three (3) years. In addition, the firm shall provide information on the circumstances and status of any disciplinary action taken or pending against the firm during the past three (3) years with state regulatory bodies or professional organization.

Commitment Letter. The proposal must include a signed letter indicating that if selected, your firm will sign an annual contract for audit services for a period of one (1) years. This contract may be extended for an additional four (4) year period for a total of five (5) years of audit services if mutually agreed upon by the Agency and the contractor.

Licensing and Insurance Requirements. The bidder shall be properly licensed or registered to do business in the State of Florida. As part of the proposal submission, the proposing contractor will be required to provide the following documents.

- a. Evidence that the key personnel that will be reviewing all work performed under the engagement is licensed as a certified public accountant.
- b. An original certificate evidencing the contractor’s Professional Liability and/or “errors and omissions” coverage.
- c. A copy of the contractor’s license issued by the State of record allowing the contractor to provide the services provided in the RFP.

- d. All insurance shall be carried with companies that are financially responsible and admitted to do business in the State of Florida. MHA shall be notified in writing of any changes in insurance coverage and shall be provided renewal certificates as needed.

Price Proposal. Submit a price proposal for the one (1) years and four (4) year option period. Audit service charges set out in the contract may be adjusted at the beginning of each renewal period by written mutual agreement between both parties.

The following factors will be considered to determine award of contract:

Qualifications of the firm	25%
Experience of the performing individuals	20%
Results of Peer Reviews	10%
Results of QASS Reviews	15%
Approach	15%
Cost to perform the Audit / Expenses	5%
Time frame	10%

Notice of Intent to Propose. If your firm elects to respond to this RFP, notify Kay Gregory at the following email address: cagey7@bellsouth.net by April 13, 2023.

All responses to the RFP must be enclosed in a sealed envelope and include two (2) copies of the required proposal format and two (2) copies of the audit contract, all with original signatures. The bidder is required to complete and submit with the bid the attached Affidavit in proof that he/she has not entered into any collusion with any person in respect to the bid for this contract.

The proposal should be hand delivered or mailed to: Milton Housing Authority, 5668 Byrom Street, Milton FL 32570.

Envelopes should be labeled as follows: Milton Housing Authority Proposal for Audit Services, DO NOT OPEN before 1:00 pm Tuesday May 16, 2023.

Office Hours: Monday-Thursday 7:00 am – 12:00 pm, 1:00 pm – 3:00 pm

Due Date and Time: April 27, 2023 3:00 p.m. Central Daylight Time.

Bids will be opened by the board chairman, Tuesday May 16, 2023 at 1:00 pm Central Daylight Time at the offices of Milton Housing Authority, 5668 Byrom Street, Milton FL 32570.

Contract will be awarded Tuesday May 30, 2023.

Should there be any questions or you require additional information please do not hesitate to contact our accountant, Kay Gregory via email: cagey7@bellsouth.net
The proposal is due in our office by Thursday April 27, 2023 at 3:00 PM Central Daylight Time. Your participation is encouraged and welcomed.

HOUSING AUTHORITY OF THE CITY OF MILTON FLORIDA
2023 RFP AUDITING SERVICES
AFFIDAVIT OF NON-COLLUSION

By signing below, the undersigned official of the Responder hereby certifies and affirms under penalties of perjury that: (a) costs, prices and/or fees and services submitted or to be submitted at a later date are or shall be made without prior agreement, understanding, or connection with any corporation, firm or person submitting a response to this solicitation, and are fair and without fraud; (b) that the Responder has not colluded, conspired, connived or agreed, directly or indirectly with any Responder or person to put in a sham submittal to refrain from competing for the proposed contract, and has not in any manner, directly or indirectly, sought by agreement, collusion, or communication with any person to fix the proposed prices or any element of the submittal, or to secure any advantage against MHA or any person; (c) that the Responder agrees to be bound by all conditions of this submittal and (d) that this official is authorized to sign this affidavit for the firm.

Name and Address of Responder

Print or Type Name and Title of Authorized Official or Representative of Responder

Signature of Authorized Official or Representative of Responder

Date