



March 17, 2025

Dear

**Uwharrie Green School, Inc. (DBA as Uwharrie Charter Academy)** invites you to submit a proposal for the preparation of its yearly audited financial statements and related filings for a three-year period beginning with the 2025 fiscal year ending June 2028. Our organization [does / does not] require a federal single audit. The audit of Uwharrie Charter Academy's nonprofit financial statements must be performed in accordance with generally accepted auditing standards.

Uwharrie Charter Academy (UCA) is a 501(c)(3) organization serving students grades Kindergarten through 12. UCA has on-campus learning with a Virtual Academy limited to 1207 Students. The mission of Uwharrie Charter Academy is to provide a truly relevant and rigorous pathway to career and college readiness by establishing relationships with students, families, and community partners. Programs include:

Uwharrie Charter Academy serves 2,200 students each year with funding from County, State, and Federal agencies as well as grants, contracts, and fees. We have 250 employees located in 5 offices. Our annual revenue has ranged between \$18MM and \$20MM over the past 3 years.

OUR NONPROFIT requires the following services:

1. Annual financial statement audit.
2. Federal Single Audit (*if applicable*).
3. Preparation of IRS form 990
4. Preparation of Charitable Organization Annual Report for the North Carolina

Attorney General

5. Management letter



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All of the above must be completed within **90** days of the end of each fiscal year, in order for our Board to review each document prior to its submission to the appropriate recipients. In addition, Uwharrie Charter Academy requires that a meeting of the auditors and selected Uwharrie Charter Academy board and staff members be held to discuss a draft version of the financial statements and that the auditors meet at least yearly with the Board of Directors' Finance committee as well as the full Board of Directors.

All proposals must include:

- a) Evidence of the firm's qualifications to provide the above services;
- b) Background and experience in auditing nonprofit clients;
- c) The size and organizational structure of the auditor's firm;
- d) Statement of the firm's understanding of work to be performed, including tax and non-audit services;
- f) A proposed timeline for fieldwork and final reporting;
- g) Proposed fee structure for each of the three years of the proposal period, including whatever guarantees can be given regarding increases in future years, and the maximum fee that would be charged;
- h) Describe your billing rates and procedures for technical questions that may come up during the year, or whether these occasional services are covered in the proposed fee structure;
- i) Names of the partner, audit manager, and field staff who will be assigned to our audit and provide biographies.
- j) A copy of your firm's most recent peer review report, the related letter of



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**Uwharrie  
Charter  
Academy**

omments, and the firm's response to the letter of comments; and

- k) References and contact information from at least XX comparable nonprofit audit clients.

Your proposal must be received by **April 30, 2025**. Send your proposal to me at , address. The Finance committee will review all proposals at their **May 2025** meeting and make a recommendation regarding the choice of auditors to the full Board of Directors in **May 2025**.

If you have any questions or would like further clarification of any aspect of this request for bid, please contact me at XXX-XXX-XXXX. I look forward to receiving your proposal.

Sincerely,

XXX

Encl: Uwharrie Charter Academy audit report and Form 990 for **FY2023**



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