

Summary of JAAZ Audit Proposals

	CliftonLarsonAllen					EideBailly					Schmidt Westergard					Henry + Horne				
	20 East Thomas Road, Suite 2300 Phoenix AZ 85012 Jackie Eckman					1850 N. Central Ave, Ste. 400 Phoenix AZ 85004 Pam Eggert					77 W. University Drive Mesa AZ 85201 Chris Johnson					2055 E. Warner, Ste 101 Tempe AZ 85284 Colette Kamps				
Staffing	Jackie Eckman, CPA Principal Jason Parish					Pam Eggert Partner Jodi Kimmerle Manager					Chris Johnson Partner Arlene Turley Manager					Colette Kamps, CPA, Partner Karen Lord, CPA, Manager Tyler Croisdale, Senior Associate (Tax)				
	2021	2022	2023	2024	2025	2021	2022	2023	2024	2025	2021	2022	2023	2024	2025	2021	2022	2023	2024	2025
Fees - Financial Audit	14,000	14,500	15,000	15,500	16,000	14,800	15,000	15,200	15,500	15,700	10,000	10,500	11,000	11,500	12,000	19,500	20,100	20,700	21,321	21,961
Fees - JA USA/Verification Audit	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000						500	500	500	500	500
Fees - Technology	750	775	800	825	850															
TOTAL	15,750	16,275	16,800	17,325	17,850	15,800	16,000	16,200	16,500	16,700	10,000	10,500	11,000	11,500	12,000	20,000	20,600	21,200	21,821	22,461
Proposed Audit Timeline	Audit plan review June/July					Planning June					Planning/Preliminary Procedures July					Planning meeting May				
	Filed work begins August					Fieldwork First of					Audit Fieldwork August					Fieldwork 16-Aug				
	Draft reports/presentation to Bd/Mgmt September					Reporting End September					Draft Stmt's September					Exit meeting 17-Aug				
	Compilation report September					Ongoing Communication All year					Issue audited F/S & report End of September					Draft F/S 15-Sep				
																Presentation to Board October				
Firm's Qualifications	National Firm, 60 years, 9,000 NFPs nationwide.US locations 120					Extensive Nonprofit experience, over 100 years, currently over 3,000 NFP clients, 190 in AZ.					Member of BRK International, worldwide firm, 50 years, local firm 40 employees.NFP clients, 50					Arizona Firm, Est 1957, 18 partners, nonprofit niche for 30 years, host Nonprofit Conference annually				
Understanding of work to be performed	yes stated in proposal					yes stated in proposal					yes stated in proposal					not entirely, they included 990 preparation, which was stated in the RFP email we did not request				
Hourly Billing Rates for Extras	Principals/Signing Director \$335					Partner \$350 - \$450										Partner \$325 -335				
	Manger/Directors \$200					Manager \$200 - 375										Manager \$180 - 255				
	Senior Associates \$160					Senior \$120 - \$225										Supervisor/Senior \$160 - 175				
	Associates \$125															Associate/Advanced \$130 - 145				
Peer Review Letter	Cherry Bekaert Pass 11/21/2016					CherryBekae Pass 1/20/2021					Anderson Zurmuehlen Pass 8/23/2019					BrownEdwar Pass 9/18/2019				
Potential Independence Issue	None					None					None					None				
Firm references from non profit audit clients	Mesa United Way, Inc., Richard James, V.P. Business & Finance					Boys and Girls Hope of Arizona, Amy Pfeifer, ED					Arizona Humane Society, Linda Gentry, Accounting Manager					Child Crisis AZ, Lisa Ricci, CFO				
	Free Arts of Arizona, Candace Langhoff, Director of Finance and Operations					Illustrative Mathematics, Kristen Welch, CFO					Aster Aging, Inc., Deborah Schaus, CEO					Southwest Autism Research Resource Center, Andrea Levy, CFO				
	West Valley Child Crisis Center, Kary Goitai, President and CEO					The Be Kind Peopel Project Foundation, Marcia Meyer, CEO					Institue for Supply Management, Debbie Fogle-Monnissen, CFO					Phoenix Zoo, Bonnie Mendoza, CFO				
											Homeward Bound, Becky Jackson, President & CEO					A New Leaf, Cathy Dyciewski, CFO				
Sample of Other Nonprofit Clients	100 Club of Arizona, Big Brothers Big Sister of Central AZ, Childhelp, Chcano Por La Causa, Fiesta Bowl, Ther Heard Museum, Make-A-Wish, McDowell Sonoran Conservancy, Mesa United Way, Musical Instrument Museum, PetSmart Charities, Sojourner Center, The Hopi Foundation					I only found the above references					Alz Assoc - Desert SW Chapter; American Medical College of Homeopathy; BBB Central AZ, Beatitudes, Boyce Thompson SW Arboretum, Canyon State Academy, Chid Crisis Center - East Valley; Childsplay, Inc.; Desert Botanical Garden; John C Lincoln; Make A Wish; Marc Center; Mesa United Way, etc.					Hacienda Healthcare, Southwest Autism Research and Resource Center, Area Agency on Aging, Open Hearts Family Wellness, Yavapai College Foundation, Boys & Girls Clubs of the East Valley, Grand Canyon Presbytery				
																Foundation for Senior Living, Tom Egan, CEO				
JAAZ Involvement	Current Auditors (3 years). \$10K donor annually for at least the past 3 years. Donated also SMC (2012) and 4.01K Race (2020). Also firm has supported with staff as volunteers for JABT (2017-18), JAFP (2016-2017x3) and in classroom (2015-16).					Donations Ladies Day to Play (2009,2001,2012). Golfer's Dream Day (2017), Company Match (2019,2020) and general donations (2000,2004,2006,2009,2014,2016). Support with volunteers JABT (2019-20 & 2108-19x2), JAFP(2019-20).					None in BCRM.					Volunteer s JABT (2016-17)				
Miscellaneous thoughts	Current Auditors (3 years). \$10K donor annually for at least the past 3 years. Also firm has supported with staff as volunteers for JAFP. Can't meet in the 3rd or th week of September as Principal schedules annual vacation those weeks, Can't be ready through their quality control earlier so we have to FAC meeting to approve in first days of October. Great Community support with Non-profit seminars, free of charge.					Great Community support with Non-profit seminars, free of charge. Referred to us as Junior League of Arizona in one spot in the proposal.					No additional fee for the JA USA report.					Great Community support with Non-profit seminars, free of charge. Locally owned. Member of BCO Alliance				

Will continue to interview