

**PROFESSIONAL FEE ACCOUNTANT SERVICES**  
**Section 8 / Housing Choice Voucher Program**  
**TOWN OF YORKTOWN**

363 Underhill Ave,  
Yorktown Heights, NY 10512  
914-962-5757

**REQUEST FOR PROPOSALS (RFP)**

**Date Issued:** 9/15/26

**Proposal Due Date:** 10/13/26

The Town of Yorktown Section 8-Housing Choice Voucher Program is soliciting proposals from qualified Certified Public Accountants (CPAs) or accounting firms to provide professional fee accountant services for the Authority's **Housing Choice Voucher (HCV)/Section 8 program**.

The selected firm will provide accounting, financial reporting, reconciliation, audit support, and related financial services in accordance with applicable HUD requirements, generally accepted accounting principles, and applicable federal, state, and local requirements.

**1. BACKGROUND**

The Town of Yorktown Section 8-Housing Choice Voucher Program is a public housing agency located in Yorktown, NY that administers approximately 130 Housing Choice Vouchers.

The Agency operates an **HCV/Section 8-only program** and does not operate conventional public housing.

The Agency is seeking a qualified independent accounting professional or firm to provide ongoing fee accounting services and financial assistance to Agency management.

**2. SCOPE OF SERVICES**

The selected accountant shall provide professional accounting services that may include, but are not limited to:

**A. Monthly Accounting**

- Maintain and/or review the Program's general ledger.
- Prepare monthly bank reconciliations.
- Review accounts payable and accounts receivable.
- Record and reconcile HCV program transactions.
- Reconcile Housing Assistance Payments (HAP).
- Reconcile administrative fee revenue and expenditures.
- Prepare required journal entries.
- Review balance sheet accounts.
- Identify and correct accounting discrepancies.

**B. Financial Reporting**

Prepare monthly financial reports for the Executive Director including:

- Statement of financial position.
- Statement of revenues and expenses.
- Budget-to-actual reports.
- Cash reports.
- HAP expenditure reports.
- Administrative fee reports.
- Other financial reports requested by the Agency.

**C. Budget Services**

Assist the Agency with:

- Annual budget preparation.
- Revenue and expenditure projections.

- HCV administrative fee projections.
- HAP projections.
- Budget amendments.
- Monthly budget-to-actual analysis.

#### **D. Year-End Services**

Provide year-end accounting services, including:

- Year-end closing entries.
- Accruals and adjustments.
- Account reconciliations.
- Preparation of year-end financial schedules.
- Preparation of audit workpapers.
- Assistance with the annual financial audit.
- Responses to reasonable auditor inquiries.

#### **E. HUD/HCV Financial Reporting**

Provide accounting assistance related to the Agency's HCV program, including:

- HCV-VMS financial reporting.
- HAP reconciliation.
- Administrative fee accounting.
- Program reserves and funding reconciliation.
- Review of HUD-related financial information.
- Assistance with HUD monitoring and financial review requests.

#### **F. Internal Controls**

Review and make recommendations concerning the Authority's internal accounting controls, including:

- Cash management.
- Disbursements.
- Bank reconciliations.
- Accounts payable.
- Payroll accounting.
- Journal entries.
- Segregation of duties.
- Financial reporting.
- Record retention.

### **3. TERM OF CONTRACT**

The anticipated contract term will be **one year**, beginning approximately January 2027 with the option for the Authority to renew the contract for up to [two/three] additional one-year periods, subject to satisfactory performance and availability of funds.

### **4. MINIMUM QUALIFICATIONS**

The successful proposer must:

- Be a licensed CPA or employ licensed CPAs.
- Be legally authorized to conduct business in the State of NY.
- Have demonstrated experience providing accounting services to governmental, nonprofit, or public housing organizations.
- Have knowledge of HUD programs and Housing Choice Voucher financial requirements.
- Maintain professional liability insurance and other insurance required by the Authority.
- Have no conflicts of interest that would prevent the firm from performing the services independently and professionally.

Experience with Housing Choice Voucher programs is strongly preferred.

## 5. PROPOSAL REQUIREMENTS

Proposals should include the following:

1. Cover letter.
2. Firm profile and history.
3. Qualifications of the firm.
4. Qualifications and resumes of proposed personnel.
5. Description of experience with Housing Authorities and/or HCV programs.
6. Description of proposed approach and work plan.
7. References for at least three similar clients.
8. Description of internal quality-control procedures.
9. Availability and response time.
10. Proposed fee schedule.
11. Hourly rates for additional services.
12. Identification of any anticipated reimbursable expenses.
13. Proof of required professional licenses and insurance.
14. Disclosure of any actual or potential conflicts of interest.
15. Any exceptions to the requirements of this RFP.

## 6. FEE PROPOSAL

Proposers shall provide a clear fee proposal using the following format:

| Service                          | Proposed Fee     |
|----------------------------------|------------------|
| Monthly accounting services      | \$ _____ / month |
| Annual year-end services         | \$ _____         |
| Annual audit preparation/support | \$ _____         |
| Special projects                 | \$ _____ / hour  |
| CPA hourly rate                  | \$ _____ / hour  |
| Senior accountant hourly rate    | \$ _____ / hour  |
| Staff accountant hourly rate     | \$ _____ / hour  |

Proposers should clearly identify any services that are excluded from the proposed monthly or annual fee.

## 7. PROPOSAL EVALUATION

Proposals may be evaluated using the following criteria:

| Evaluation Factor               | Points     |
|---------------------------------|------------|
| Qualifications and experience   | 25         |
| HCV/HUD experience              | 20         |
| Proposed approach/work plan     | 20         |
| Fee proposal                    | 20         |
| References                      | 10         |
| Availability and responsiveness | 5          |
| <b>Total</b>                    | <b>100</b> |

The Agency reserves the right to request clarification, conduct interviews, negotiate with proposers, reject any or all proposals, and select the proposal it determines to be in the best interest of the Agency.

## **NON-COLLUSIVE BIDDING CERTIFICATION**

Made pursuant to Section 103-d of the General Municipal Law of the State of New York.

By submission of this bid, Bidder and each person signing on behalf of Bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury, that to the best of his or her knowledge and belief:

1. The prices in this bid have been arrived at independently without collusion, consultation, communication, or agreement for the purpose of restricting competition, as to any matter relating to such prices with any other Bidder or with any competitor;
2. Unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by Bidder and will not knowingly be disclosed by Bidder prior to opening, directly or indirectly, to any other bidder or to any competitor; and
3. No attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of restricting competition.

A bid shall not be considered for award nor shall any award be made where (1) (2) and (3) above, have not been complied with; provided, however, that if in any case Bidder cannot make the foregoing certification, Bidder shall so state and shall furnish with the bid a signed statement which sets forth in detail the reasons therefore. Where (1) (2) and (3) above have not been complied with, the bid shall not be considered for award nor shall any award be made unless the head of the purchasing unit of the political subdivision, public department , agency or official thereof to which the bid is made, or his designee, determines that such disclosure was not made for the purpose of restricting competition.

Dated: \_\_\_\_\_

Bidder:

\_\_\_\_\_  
(Legal name of person, firm or corporation)

By: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Please Print Name)

\_\_\_\_\_  
(Title)

State of New York                    )  
County of \_\_\_\_\_)ss.:

On the \_\_\_\_ day of \_\_\_\_\_ in the year 20\_\_ before me, the undersigned, personally appeared \_\_\_\_\_, personally known to me or proved to me on the basis of satisfactory evidence to be the individual(s) whose name(s) is (are) subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their capacity(ies), and that by his/her/their signature(s) on the instrument, the individual(s), or the person upon behalf of which the individual(s) acted, executed the instrument.

\_\_\_\_\_  
(Notary Public)