



**Request for Qualifications for
Audit Services for California Earthquake Authority (CEA) and
California Residential Mitigation Program (CRMP)**

RFQ # 01-25

May 1, 2025

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I. INTRODUCTION & SUMMARY OF KEY DATES

The California Earthquake Authority (CEA) and the California Residential Mitigation Program (CRMP) are seeking to contract with an audit firm to perform various audits. The general qualifications of the successful proposer are summarized below and are described with more particularity in the “Services to be Provided” section of this RFQ.

The following schedule is subject to modification by CEA. Questions must be submitted as described in Section IV.

Date	Planned Activity
May 1, 2025	Issue Date for RFQ #01-25: Audit Services for CEA
May 15, 2025	Questions must be submitted via email to CEA by 5:00 p.m. Pacific Time. Email address: rfq01-25@calquake.com
May 21, 2025	Responses to questions will be posted on the CEA website by 5:00 p.m. Pacific Time. NOTE: Any CEA delay in posting responses to questions will not extend the deadline for submission of proposal.
May 28, 2025	Final date for CEA to post addenda for which proposers are responsible.
May 30, 2025	Submission Deadline. All submissions must be received by CEA no later than 5:00 p.m. Pacific Time.
July 15, 2025	Proposal evaluation and announcement of finalists by CEA.
TBD	Finalist presentations (at CEA’s option) in Sacramento, California or done remotely over Microsoft Teams.
TBD	Announcement of Selection. CEA will announce the successful proposer; that proposer will be awarded an opportunity to negotiate a contract to provide services to CEA and/or CRMP. This is an approximate date.

II. BACKGROUND OF THE CALIFORNIA EARTHQUAKE AUTHORITY AND THE CALIFORNIA RESIDENTIAL MITIGATION PROGRAM

A. California Earthquake Authority

Following the unprecedented losses from the 1994 Northridge earthquake, many insurance companies either ceased or severely restricted the sale of new homeowner earthquake insurance policies in California. In response, the California Legislature created CEA, a publicly managed, privately funded, public instrumentality of the State of California, to provide residential earthquake insurance. CEA began writing residential earthquake insurance effective December 1, 1996.

CEA offers earthquake insurance policies through its participating residential insurance providers. Additional information and a list of participating insurers is available at: <https://www.earthquakeauthority.com/>.

CEA is administered by a Governing Board composed of the Governor, State Treasurer, and Insurance Commissioner as voting members; the Speaker of the Assembly and President Pro-Tempore of the Senate serve as non-voting members. The Governing Board is advised by an Advisory Panel that consists of consumer and insurance-industry representatives.

CEA is financially independent from the State of California and is not a part of the State budget. By law, the State of California has no liability for claims, costs, or other liabilities arising from CEA operations.

B. California Residential Mitigation Program

In August 2011, the Governor's Office of Emergency Services (Cal OES) and the CEA entered into a Joint Exercise of Powers Agreement (JPA) to create the California Residential Mitigation Program (CRMP) to carry out a joint mitigation program. Both Cal OES and CEA are authorized to assist California dwelling owners who wish to retrofit their dwellings to protect against earthquake damage. CRMP is a legally separate entity from its members. It has a governing board consisting of two members appointed by the CEA and two members appointed by Cal OES.

Funding for CRMP is provided by voluntary advances, CEA contributions, and federal grants. CRMP has an agreement to accept personnel, equipment, and office space from CEA. These include the services of CRMP's executive director, secretary, and treasurer.

III. PURPOSE

CEA is seeking an audit firm to perform the CEA's annual financial statement audits under Governmental Accounting Standards Board (GASB), and Statutory Accounting Principles basis (SAP). The CEA is also the pass-through entity for various federal programs and is seeking the services for a Federal Single Audit under the audit requirements of Title 2 U.S Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards.

CRMP is seeking an audit firm to perform CRMP's annual financial statement audits under GASB, and a Federal Single Audit under the audit requirements of Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards.

See Section VI. Services to be Provided, for the specific requirements.

IV. SUBMITTING QUESTIONS

Any questions that potential proposers might have about the RFQ #01-25 are to be submitted solely by email. In submitting questions, proposers must follow the timeframes in Section I, Introduction & Summary of Key Dates.

Submit all questions by email to: rfq01-25@calquake.com

CEA will respond to questions as they are received. Answers to all questions received in a timely manner will be posted on CEA's website <https://www.earthquakeauthority.com/about-cea/contracting/>; the questions that have been submitted and the responses thereto may be viewed by following the links found under the "CONTRACTING OPPORTUNITIES" section of the home page. All questions (without attribution to or identification of the person or entity asking the question), and all responses to those questions, will be posted.

As noted above, any CEA delay in posting responses to questions will not extend the deadline for submission of proposal.

V. PROPOSERS' RESPONSIBILITIES REGARDING ADDENDA

CEA reserves the right, in its sole discretion, to modify any part of this RFQ by issuing one or more written addenda.

Addenda to this RFP issued by CEA, if any, will be posted solely to CEA's website, <https://www.earthquakeauthority.com/about-cea/contracting/>. Each proposer should continue to check the CEA website through the final submission date for any addenda that may be posted. Each proposer is required to acknowledge, as part of the proposer's cover letter (see Section VIII. Proposal Submission Instructions and Requirements), that the proposer has reviewed any addenda that are posted one week or more prior to the final proposal submission date.

Each proposer acknowledges and accepts the affirmative responsibility to inquire regarding, and seek clarification of, any part or provision of this RFQ that the proposer does not understand or that the proposer believes is reasonably susceptible to more than one interpretation. If a proposer discovers any ambiguity, conflict, discrepancy, omission, or error in the RFQ, the proposer must immediately notify CEA via email rfq01-25@calquake.com, and may request clarification through submitting a question in accordance with Section IV. In its sole discretion, CEA may issue clarifications in the form of written addenda to this RFQ and will post the written addenda to <https://www.earthquakeauthority.com/about-cea/contracting/>.

In its sole discretion, CEA may disregard any and all claims of ambiguity, conflict, discrepancy, omission, or other error received by CEA after the final submission date for proposals.

Unless otherwise specifically stated by CEA, no additional time to meet any deadline will be allowed due to corrections or clarifications made by CEA.

The provisions of any addendum formally issued by CEA are deemed to be incorporated into this RFQ, and in addition and as appropriate, that addendum may be made a part of or otherwise reflected in any contract awarded as a result of this RFQ.

VI. SERVICES TO BE PROVIDED

The purpose of this RFQ is to solicit proposals for an external auditor. Ideally, the selected external auditor will provide audit services for both CEA and for CRMP, under two separate contracts, one with each entity. Each contract term will be for a five-year period for the audit years 2025 - 2029, with two one-year extensions at the CEA's and CRMP's option. CEA, and CRMP will reserve the right to terminate the contract upon 60 days' written notice, with or without cause.

The CEA in preparing its financial statements adheres to both GASB principles, and SAP. The CEA is also a pass-through entity for various federal programs/funds and is required to meet Generally Accepted Government Auditing Standards (GAGAS), and other federal requirements. CEA's website, www.EarthquakeAuthority.com, contains all the prior years' audited financial statements in the following section:

<https://www.earthquakeauthority.com/about-cea/financials/financial-statements> .

CRMP in preparing its financial statements adheres to GASB principles. CRMP receives various federal funds and is required to meet GAGAS, and other federal requirements. CRMP's website,

<https://www.californioresidentialmitigationprogram.com/sites/crmp/files/documents/2024/notice-and-agenda-including-meeting-memoranda-august-27-2024.pdf>, contains CRMP's 2024 financial statements beginning on page 12 of 49.

The CEA's annual audits must be completed within 150 days of the close of each calendar year and then present the financial statements to the CEA Governing Board. The external auditor must complete and make available to the CEA for public distribution the audit reports for each audit year by June 30th of the subsequent fiscal year.

CRMP's annual audits must be completed within 120 days of the close of each calendar year. The auditors' reports will be made available for distribution by June 1st of the close of the following calendar year. Following completion of each annual audit, the external auditor will present the audit reports to CRMP's Governing Board at its public meeting.

VII. MINIMUM QUALIFICATIONS

Each proposer (firm) must meet, to CEA's/CRMP's satisfaction, all or materially all of the following minimum qualifications to be considered for a contract award. The proposer must affirmatively attest to each of the minimum qualifications in its cover letter. Failure to satisfy all minimum qualifications, in CEA's/CRMP's sole judgment, may result in rejection of the proposal.

1. The firm must have been in business for at least five years.
2. The firm must have at least five years of experience auditing insurance companies.
3. The firm must have at least one key professional member of the firm, who would be assigned to the CEA and CRMP account on a long-term basis, and who has a minimum of five years' experience auditing GASB financial statements.
4. The firm must have at least one key professional member of the firm, who would be assigned to the CEA and CRMP account on a long-term basis, and who has a minimum of five years' experience auditing financial statements in accordance with SAP (as SAP may be applied or modified for use in California by the California Department of Insurance).
5. The firm must have at least one key professional member, who would be assigned to the CEA and CRMP account on a long-term basis, and who has a minimum of five years' experience auditing insurance companies. The individuals listed in qualification items 3-5 may be the same individual or may be multiple individuals, in the proposer's discretion. Proposers should be aware that the CEA's/CRMP's contract form contains a Key Personnel provision, which limits a contractor's ability to replace key personnel on the CEA and CRMP accounts without the CEA's/CRMP's consent.
6. The person(s) supervising the audits and signing the audit reports must be licensed by the State of California as a Certified Public Accountant, in good standing, and with a full-attestation active license.
7. If a firm is selected as the successful proposer for this RFQ to serve as the auditor for a successive five-year term, then the lead partner, the concurring partner, and all other partners who had a significant role in any CEA and CRMP audit during the earlier contract term are subject to a five-year "time out" during which they cannot participate in any CEA and CRMP related audit.

VIII. PROPOSAL SUBMISSION INSTRUCTIONS AND REQUIREMENTS

A. Submission Deadline and Format

In submitting proposals in response to this RFQ, each proposer must comply with the deadlines in Section I and the format requirements in this section.

1. Proposals must be emailed:
 - a) as an attachment in PDF format, to the listed email address:
rfq01-25@calquake.com
 - b) Subject: Response to CEA Request for RFQ #01-25 – Audit Services for CEA and CRMP
2. Proposals must not exceed sixteen (16) single-sided typed pages, with a size twelve (12) Times New Roman font, excluding Required Attachments and the Cover Letter. Any additional attachments (excluding Required Attachments) submitted must not exceed a total of ten (10) single-sided typed pages.
3. If a proposal contains confidential proprietary information, a statement to that effect must be included in the cover letter, and each and every page containing confidential proprietary information must be so designated on the upper right-hand corner.
- * Please be aware that CEA is a public instrumentality of the State of California and that CEA's records and documents in its possession might be subject to public disclosure and production pursuant to various laws, including but not limited to the California Public Records Act and the Bagley-Keene Open Meeting Act. If a proposer provides documents or other information that it believes is of a confidential or proprietary nature, please mark it as such, as noted above. CEA will make reasonable efforts, within the bounds of and in compliance with applicable public disclosure laws, to honor those characterizations and not disclose those documents, but CEA cannot guarantee or promise that it will succeed in its efforts under all circumstances.
- ** Please note that no proposal can be considered confidential and proprietary in its entirety.
4. If, before the Submission Deadline date, a proposer discovers an error or omission in a proposal already submitted to CEA, the only method of correction or modification is to withdraw the proposal in its entirety via email to *rfq01-25@calquake.com* and resubmit the corrected or modified proposal before the Submission Deadline date and time. Corrections or modifications offered in any other manner will not be considered.
5. All proposals become the property of CEA upon receipt.

6. All costs to develop proposals and participate in the RFQ process are entirely the sole responsibility of the proposer and cannot be charged to CEA and CRMP.
7. CEA accepts absolutely no responsibility for lost, misplaced, mishandled, or late delivered proposals, regardless of the reason or explanation.
8. Only one proposal per individual, firm, partnership, or corporation, or combination of such entities formed to propose under this RFQ, will be considered. Any reasonable grounds for believing a proposer has submitted multiple proposals under more than one name is good cause for rejection by CEA of all proposals in which the proposer is involved.
9. Proposals must be clearly identified "RFQ #01-25: Audit Services for CEA and CRMP." Additional information may be found under Section VII - Minimum Qualifications.
10. Proposers must review all addenda posted on CEA's website before submitting proposals.
11. Each proposal must state the proposer's name and the CEA RFQ # 01-25 on each page of the proposal.
12. CEA may request additional information from any or all respondents after the initial evaluation of the submission in order to clarify any information in the submission.

B. Required Components of Submission

To assist CEA in the evaluation and comparison of responses, submissions must follow the order and format listed below. Submissions may include additional information, at the proposer's option.

1. **Cover letter (signed).** CEA will reject any submission that contains an unsigned cover letter. The cover letter must contain the following:
 - a) proposer's or proposing team's company (or individual) name(s), address(es), and telephone number;
 - b) the name, title or position, telephone number, and email address of the person signing the cover letter and contact identification for any other persons authorized to make binding representations regarding the submission;
 - c) a statement that the signer's signature constitutes unrestricted authority to make the submission regarding this RFQ #01-25;

- d) confirmation that the proposer is willing to be bound by standard terms and conditions satisfactory to CEA;
- e) confirmation statement that the proposer has reviewed any addenda to this RFQ posted to <https://www.earthquakeauthority.com/about-cea/contracting/>.

2. Firm Background and History.

- a) Location of firm headquarters.
- b) Other firm offices and their locations.
- c) Number of years the firm has been in existence in the same or substantially the same form and under the same trade name.
- d) Total number of employees.
- e) Description of the firm's ownership structure identifying any affiliated or subsidiary organization(s).
- f) Describe, in a Required Attachment to the proposal, the following, including a brief description of the matter, the result or resolution (if a closed matter), and the current status and outlook (if a pending matter), for any of the following matters brought against the firm or any of its personnel arising out of any investment or other business activities of the firm:
 - Any currently-pending criminal prosecutions or civil enforcement actions brought by any government, government agency, or other government entity, and any other such criminal prosecutions or civil enforcement actions that were pending within the past five years.
 - Any litigation, arbitration, or other legal proceedings over the past three years that either (1) has resulted in any adverse judgment, ruling, or arbitration award, or any settlement, or (2) is currently pending (unless, in the view of the proposer's legal counsel, the matter presents no appreciable risk of ultimately resulting in any adverse judgment, ruling, award, or settlement).
- g) Financial Summary (in the format shown in Attachment B to this RFQ). The proposer must include a summary of financial performance for the past five years. Summary information should include Revenues, Operating Expenses, Net Income, Total Assets, Total Liabilities, Outstanding Debt, and Owners Equity.

- h) Identification of the proposer's major audit clients.
- i) Description of any peer review of the firm's internal controls or audit processes within the past three years.

3. **Work Plan and Methodology.** Describe the proposer's local and national service capability to perform the proposed contracts. Please answer as specifically as possible. Avoid generalizing, and describe, wherever possible and known, differences between the proposer and other firms. The work plan and methodology will be evaluated on clarity, comprehensiveness, and presentation of materials in a thorough and concise format. The description should address, without limitation, the following components:

- a) Proposer's understanding of the work to be performed pursuant to this RFQ.
- b) Identify clearly any parts of the requirements within this RFQ with which the proposer does not concur or cannot satisfy.
- c) Explain in detail any potential for conflict of interest, or apparent or potential conflict of interest that would be created by the proposer's contracting with the CEA and/or CRMP, and proposal for resolution of potential conflicts of interest.
- d) Identify any other "value-added" items or services the proposer would provide to the CEA and/or CRMP.
- e) Confirm and describe the firm's ability to respond promptly to the CEA's and CRMP's information requests on an as-needed basis.
- f) Outline the firm's policy for confidentiality of its clients' matters.
- g) Define "client service" as it relates to the firm and describe mechanisms that are in place to solicit and respond to feedback.
- h) Identify the person who will serve as the primary contact for the contracts.
- i) List the firm's professionals who will be assigned to the CEA and CRMP accounts and their responsibilities. Provide a brief resume that outlines the background, training, and audit experience for the primary contact person(s) and each member of the audit team that may be assigned to the CEA and CRMP accounts.

4. **Proposed Fees.** Each proposer must state in its proposal what fees it proposes to charge for each year of the proposed term (fiscal years ending 2025-2029) if they were to be selected as CEA’s and CRMP’s auditors. The fees proposed must be clearly identified as flat fees, reimbursable expenses, and/or any other type of compensation. The proposal must contain all fees, expenses, and compensation for the annual audit and for each financial statement generated (GASB, SAP, and Single Audit), in the format shown on Attachment C to this RFP.

5. **Diversity Certification.** Proposer must include the following list in the proposal and identify all applicable designations. If no designations are applicable, please confirm by selecting “None.”

- | | |
|---|---|
| <input type="checkbox"/> Women Business Enterprise (WBE) | <input type="checkbox"/> Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE) |
| <input type="checkbox"/> Minority Business Enterprise (MBE) | <input type="checkbox"/> Multi-Certified Business Enterprises (MCBE) |
| <input type="checkbox"/> African American
<input type="checkbox"/> Asian/Pacific Islander
<input type="checkbox"/> Hispanic/Latino
<input type="checkbox"/> Native American
<input type="checkbox"/> Multi-Ethnic | - <i>check all that apply</i> |
| <input type="checkbox"/> Disabled Veteran Business Enterprise (DVBE) | <input type="checkbox"/> WBE |
| <input type="checkbox"/> Veteran Owned Business Enterprise (VOBE) | <input type="checkbox"/> MBE |
| | <input type="checkbox"/> DVBE |
| | <input type="checkbox"/> VOBE |
| | <input type="checkbox"/> LGBTBE |
| | <input type="checkbox"/> None |

6. Required Attachments:

- Drug-Free Workplace Certification (Attachment A)
- Financial Summary (Attachment B)
- Summary of business-contingency and disaster recovery plan
- Proposed Fees (Attachment C)
- References (Attachment D)

IX. PROPOSAL EVALUATION AND SCORING CRITERIA

The purpose of the proposal-evaluation process is to: (1) determine whether the proposal has satisfied the minimum qualifications, content, and format requirements; (2) identify the

proposers most likely to satisfactorily perform the services described; and (3) determine the extent of each proposer’s demonstrated commitment to diversity. The evaluation process will be conducted in a comprehensive and impartial manner.

Each proposal package will be electronically date-and time-stamped when received. Any proposal received after the final-filing time on the final-filing date will be received and a statement may, in CEA’s sole discretion, be sent to the proposing firm stating that the proposal did not meet the submission deadline, and that the proposal will be deemed not eligible.

Each timely-submitted, or accepted, proposal will be reviewed to determine whether it satisfies the Minimum Qualifications specified in Section VII. Proposals that meet the Minimum Qualifications will be evaluated and scored. The highest possible score is 100 points.

CEA is committed to inclusion, diversity, equity, and accessibility (“IDEA”), within the organization and within organizations with which it partners, including CRMP, and also as part of its evaluation of external providers. CEA values organizations that equitably distribute their employment and work opportunities among all populations. With that in mind, one of the factors on which every potential goods and services provider will be evaluated is a demonstrated commitment to IDEA. Whenever reasonably practical, CEA expects that commitment to be reflected in the provider’s staffing, both within the provider’s entire workforce, and particularly among the staff assigned to CEA projects.

At its sole option, CEA may invite finalists to interview with CEA, either virtually or at CEA’s office in Sacramento, California. All costs and expenses associated with preparing and submitting this RFQ, together with all travel costs, if any, related to the interview and contract-negotiation processes, are the sole responsibility of the proposer.

Criteria	Maximum Points
Qualifications: Firm Background, History, & IDEA	20
Work Plan and Methodology	25
References	15
Pricing/Fees	15
Interview	25
TOTAL POSSIBLE SCORE	100

X. AWARD OF OPPORTUNITY TO CONTRACT

If, at any time during or at the conclusion of the RFQ process, CEA determines that, in its opinion, the results or prospects of this RFQ process are unsatisfactory, CEA reserves the right to wholly discontinue this process and decline to award a contract to any proposer.

The opportunity to contract will be awarded to the proposer scoring the highest total points. The final approval of the right to contract will be determined by CEA’s Governing Board and CRMP’s Governing Board. All proposers will be notified of the outcome of the RFQ. News releases pertaining to this RFQ must not be made without CEA’s prior written approval.

XI. TERMS AND CONDITIONS

Any contract CEA and CRMP propose to enter into as a result of this RFQ #01-25 process will include standard terms and conditions satisfactory to CEA and CRMP. While each contract might be similar, all proposers must understand that each entity is represented by its own legal counsel, and any resulting contracts may contain different terms and conditions.

XII. COMMENCEMENT DATE

The target commencement date of services is TBD.

Drug-Free Workplace Certification

ATTACHMENT A

CEA/CRMP

The respondent named below hereby certifies that, if awarded a contract, it will comply with California Government Code Section 8355 in matters relating to providing a drug-free workplace. The below-named respondent will:

1. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations, by California Government Code Section 8355(a), subdivision (1).
2. Establish a Drug-Free Awareness Program as required by California Government Code Section 8355(a), subdivision (2), which will include, but not be limited to the following:
 - a. The dangers of drug abuse in the workplace,
 - b. The person’s or organization’s policy of maintaining a drug-free workplace,
 - c. Any available counseling, rehabilitation, and employee’s assistance programs, and
 - d. Penalties that may be imposed upon employees for drug abuse violations.
3. Provide as required by California Government Code Section 8355(a), subdivision (3), that every employee who works on the proposed contract:
 - a. Will receive a copy of the company’s drug-free statement, and
 - b. Will agree to abide by the terms of the company’s statement as a condition of employment on a contract or grant.

CERTIFICATION

I, the official named below, hereby swear that I am duly authorized legally to bind the respondent to the above-described certification. I am fully aware that this certification, executed on the date and in the county below, is made under the penalty of perjury under the laws of the State of California.

Respondent’s Authorized Signature

Title

Date Executed

In the County of

Federal Identification Number

Financial Summary

ATTACHMENT B

CEA/CRMP

Please provide the summarized financial information below and note that the requirement to include a summary of financial performance for the past five years is mandatory.

	2024	2023	2022	2021	2020
Assets					
Liabilities*					
Debt Outstanding					
Lease Obligations					
Owner’s Equity					
Revenue					
Operating Expense					
Net Income					

*Liabilities should include all liabilities including the items requested (debt outstanding and lease obligation)

Proposed Fees

ATTACHMENT C

CEA/CRMP

Each proposer must state what fees it proposes to charge for each year of the proposed term (fiscal years ending 2025 – 2029) if they were to be selected as CEA’s and CRMP’s auditors. The fees proposed must be clearly identified as flat fees, reimbursable expenses, and/or any other type of compensation. The proposal must contain all fees, expenses, and compensation for the annual audit and for each financial statement generated (GASB, SAP, and Single Audit).

CEA Audit - GASB					
Task	2025 Audit	2026 Audit	2027 Audit	2028 Audit	2029 Audit
Proposed Fee					

CEA Audit - SAP					
Task	2025 Audit	2026 Audit	2027 Audit	2028 Audit	2029 Audit
Proposed Fee					

CEA Audit - Single Audit					
Task	2025 Audit	2026 Audit	2027 Audit	2028 Audit	2029 Audit
Proposed Fee					

CRMP Audit - GASB					
Task	2025 Audit	2026 Audit	2027 Audit	2028 Audit	2029 Audit
Proposed Fee					

CRMP Audit - Single Audit					
Task	2025 Audit	2026 Audit	2027 Audit	2028 Audit	2029 Audit
Proposed Fee					

References

ATTACHMENT D

CEA/CRMP

Please fill out the References Template with basic information about no less than three current clients that receive similar services as described in this RFQ. Clients that serve as references must have been customers of the proposer for at least one year from the issue date of this RFQ. Each field must be completed.

Company One	
Name of Firm	
Contact Name	
Title of Individual	
Address of Firm	
Phone Number	
Description of Services	
Date of Services	
Dollar Value of Services Provided	

Company Two	
Name of Firm	
Contact Name	
Title of Individual	
Address of Firm	
Phone Number	
Description of Services	
Date of Services	
Dollar Value of Services Provided	

Company Three	
Name of Firm	
Contact Name	
Title of Individual	
Address of Firm	
Phone Number	
Description of Services	
Date of Services	
Dollar Value of Services Provided	