

Request for Proposal

For Audited Services

Fiscal Years - January 1, 2018 – December 31, 2020

Issued by O'Keefe Ranch & Interior Heritage Society

Return Date: September 7, 2018 by 4:30 pm

Request for Proposal  
External Audit Services

## **Instruction to Bidders**

O'Keefe Ranch & Interior Heritage Society is a registered non-for-profit organization that is responsible for running the O'keefe Ranch Historic Site under lease from the City of Vernon. It operates out of offices at O'Keefe Ranch, Hwy 97, Vernon, BC,

This document constitutes a Request for Proposal (RFP). Which specifies the requirements for Audit Services. All pricing information should be fully disclosed with all charges clearly defined. Please feel free to address any additional services not specifically mentioned in this RFP that may be of potential benefit to the Board.

## **Objective**

The objective in the call for proposals is to select an auditing firm to provide audit services for the O'Keefe Ranch and Interior Heritage Society.

## **Terms of Contract**

The term of the contract is for a one-year (1) term commencing for the fiscal year of January 1, 2018 to December 31, 2018. Two additional years of either audit or review engagement may be added if both parties agree. Ninety (90) days written notice must be provided if either party wishes to terminate the agreement prior to the contract's expiry date.

## **Inquiries during Proposal Process**

All enquiries regarding the RFP can be emailed to:

,  
Ranch Administration – through Barb Britch, bookkeeper

Email [bookkeeper@okeeferanch.ca](mailto:bookkeeper@okeeferanch.ca)

Or Carolyn Farris, Tressurer at [cfarris@telus.net](mailto:cfarris@telus.net)

## **Submission of Proposal**

Submit one copy of the proposal, in a sealed envelope and clearly marked:

RFP Response Audit Services addressed to:

O'Keefe Ranch & Interior Historic Society

Proposals will be received at the Ranch Office during regular business hours only: 10:00 am – 4:00 pm

Bidders are solely responsible for the method of conveyance of their proposal to the receiving point.

The O'Keefe Ranch & Interior Heritage Society reserves the right to accept any proposal submitted or to reject all proposals.

It is anticipated that the successful bidder will be notified no later than September 28, 2018.

## **Termination of Contract**

The O'Keefe Ranch & Interior Heritage Society reserves the right to terminate the agreement with 30 days written notice to the firm subject to the following:

- The firm fails to perform in accordance with specified service requirements as outlines in the RFP.
- The firm fails to provide any product or service as specified in the agreement without written explanation.
- The firm otherwise violates the provisions of the RFP to a significant degree.

## **Proposal Submission Due:**

**September 7, 2018 by 4:30 pm**

## **DECISION MATRIX**

Bids will be evaluated against the following decision matrix:

Team providing services	25%
Price	30%
Transition Plan	20%
References	25%

### **Bidder Qualifications**

To be considered a candidate for the provision of audit services for the O'keefe Ranch & Interior Heritage Society, bidders must:

- Be a recognized Chartered Professional Accounting firm experienced and knowledgeable in the not- for-profit sector;
- Be current with respect to legislation relevant to the operation of not-for-profit organizations.

### **Service Requirements**

Following are specific services required:

- Audited financial statements and not-for-profit return;
- The Auditor shall conduct the examination in accordance with Canadian generally accepted auditing standards;
- The Auditor shall present the audit to the Membership and Board of Directors at the Annual General Meeting at the end of April each year;
- The Auditor shall advise the Board of any and all changes in accounting and reporting requirements;
- The Auditor shall serve as a resource and be available for consultation on accounting and related issues throughout the fiscal year.

### **Proposal Contents and Format**

- Following are to be included:
- Firm's experience working with the not-for-profit sector;
- List of individuals in the firm that will be directly responsible for the audit;
- Demonstrated knowledge and expertise related to the not-for-profit sector;
- The name and contact information of one not-for-profit organization for whom the firm has performed audits within the last two years;
- Fee structure for audit services.
- Completion of charity tax return

### **Basis of Awarding**

A letter of engagement will be signed with an independent auditor who, based on an evaluation of all responses, applying all criteria and oral interviews (if performed), is determined to be the best qualified to perform the services, and best qualified to deliver the best value package of deliverables.

The right is reserved, as the interest of the O'Keefe Ranch & Interior Heritage Society may require, to waive any defects or all informalities in any proposal, to reject any or all proposal, to take any or all proposals under advisement or to accept any proposal as may be deemed to be in the O'Keefe Ranch & Historic Society's interest in meeting the standards of quality, price & value ("best" proposal).