

**REQUEST FOR PROPOSALS**  
**External Audit Services**  
**Edmonton Heritage Council**

**INTRODUCTION**

[Edmonton Heritage Council](#) is a not-for-profit and federally registered charitable organization that supports and promotes heritage in Edmonton and the surrounding region.

We connect people with the stories of their city. EHC provides leadership, support, and programs to help Edmontonians research, preserve, interpret, and advocate for their heritage. EHC supports the development and successful public role of the heritage sector in Edmonton as articulated in [Connections & Exchanges: A 10-Year Plan to Transform Arts and Heritage in Edmonton, 2019-2028](#).

EHC is seeking a qualified and registered external audit service provider for up to four (4) years: the fiscal years ending December 31 of 2023 through 2026.

**AUDIT SERVICES**

The proposal is expected to cover the following audit services, including but not limited to:

- Audit of our Annual Financial Statements;
- Completion of annual audit in compliance with Canadian Accounting Standards for Not-for-Profit Organizations;
- Completion of an audit service plan within the final quarter of the fiscal year;
- Confirm EHC's compliance with our legal funding contracts and other agreements as required.

**CONTEXT FOR PROJECT**

EHC provides its audited financial statements to its membership, board, key stakeholders (e.g., City of Edmonton), and the wider community as part of its annual reporting and accountability work. EHC'S financial management is supported by a Chartered Professional Accountant (CPA).

For additional information:

- Previous Annual Reports, Audited Financials: [www.edmontonheritage.ca/reports](http://www.edmontonheritage.ca/reports)
- Program and Project Information: [www.edmontonheritage.ca/initiatives](http://www.edmontonheritage.ca/initiatives)

**BID AND APPOINTMENT SCHEDULE**

Subject to discussion with prospective contractor.

RFP Release Date	November 10, 2022
Submission Deadline (2:00 PM)	January 9, 2023
Meetings with Proponents	January 16-20, 2023
Approval of Recommendation by Board of Directors	March 1, 2023
Duration (subject to year-to-year approval)	2023-2026 (year-end financials)

## **PROJECT DELIVERABLES/SCOPE**

Proposal content as below.

### **Letter of Introduction**

- The letter of introduction must be signed by an authorized representative of the Proponent and be placed as the first page of the Proposal.
- Said letter should include a confirmation of full compliance to all the requirements and terms and conditions contained within the RFP.
- The letter should also provide a Proponent contact including the person's name, title, address, telephone number and email address for all questions and clarifications arising from the Proposal.

### **Qualifications and Experience**

- Confirm your organization is a professional accounting firm registered by the Chartered Professional Accountants of Alberta and that your license is in good standing. This includes all requirements for errors and omissions insurance are met and current;
- Confirm the firm's independence with respect to the Edmonton Heritage Council;
- Provide a summary of the resources and organization of your firm and audit office;
- The firm's experience auditing nonprofit charitable organizations of a size similar to the EHC. Include the name and contact information for at least three (3) nonprofit charitable organizations for whom the firm has performed audits within the last two years;
- Demonstrated knowledge and expertise related to nonprofit charitable organizations.

### **Audit Services**

Please ensure the proposal addresses the following:

- The process the client service team will follow to acquire an understanding of EHC's programs and services to support audit understanding and add audit value;
- Description of how your firm will approach the audit of EHC, including the use of technology and the areas that will receive primary emphasis;
- Information and documentation the EHC will be expected to provide to the firm;
- Audit related activities proposed to be carried out at the EHC office;
- The communication process used by the firm to discuss issues and/or changes in accounting and reporting requirements with management, the EHC Audit and Finance Committee and the EHC Board of Directors;
- List of individuals in the firm that will be directly responsible for the audit, their qualifications and experience working with nonprofit charitable organizations;
- Presentation of audit statements and findings to the Audit Committee and/or Board of Directors, as necessary;
- The ability to present the audited statements at EHC's annual general meeting (held in May) upon EHC's request;
- The Auditor shall serve as a resource and be available for consultation on accounting and related issues throughout the fiscal year;
- If applicable, information on relevant education sessions and/or resources your firm may provide to the nonprofit sector.

## Budget

Please ensure your proposal addresses the following criteria:

- Fee structure for audit services, with whatever guarantees can be given regarding increases during the term of the audit contract;
- Annual person hours available to the management, the EHC Audit and Finance Committee or the EHC Board of Directors for consultation or advice provided for within the fee structure.

## Proposal Instructions

- Proposals are to be clearly written and concise. Where appropriate, use of point-form format is welcome.
- The Proponent is fully responsible for obtaining all information required for the preparation of its Proposal. The EHC shall not be responsible for any costs, expenses, losses, damages, or liability incurred by Proponents in responding to this RFP.
- Proposals will be received until 2 pm (MT) January 9, 2023. Proposals received after this time will not be considered.
- Packages with the proposals should be clearly identified and directed to **G. Wagner, Chair, Audit Committee, c/o Edmonton Heritage Council** via courier or electronic PDF at the email or mailing address provided below.
- Electronic submissions are not considered to be received until a reply email is sent from EHC confirming receipt.
- Proposals should be organized in the following format:
  - Letter of Introduction
  - Qualifications
  - Audit Services
  - Proposed Fees and Costs

If you have questions, please forward them via email to David Ridley, Executive Director at [dridley@edmontonheritage.ca](mailto:dridley@edmontonheritage.ca).

To submit a response to this RFP, please do so by email ([info@edmontonheritage.ca](mailto:info@edmontonheritage.ca)), mail, or courier.

## Mailing Address:

Edmonton Heritage Council  
Prince of Wales Armouries Heritage Centre  
218A-10440 108 Ave NW  
Edmonton AB  
T5H 3Z9