



Wheatland Housing Management Body

June 1, 2023

Audit Team

Subject: Request for Proposal for External Audit Services

Dear Sir/Madame:

The Board of Directors of Wheatland Housing requires professional services with respect to the annual audit of the Financial Statements of Wheatland Housing Management Body. You are invited to submit a proposal for the provision of those services. Attached are "Requirements/Specifications" that apply.

Please note the following:

- The work is to commence as indicated within the Additional Information - Audit Timelines:
- Your written response to this invitation to submit a Proposal is due not later than September 5th, 2023, at 4:00 PM MST.

Responses shall include:

- A statement of understanding of the work and a proposed approach to the work, and a summary of at least two (2) projects successfully completed by your firm that are of a similar size and complexity as that described in the Requirements/Specifications.
- The name (s) and credentials of the resource (s) proposed to perform the work.

Replies are to be addressed to:

Vickey Cook
CAO Wheatland Housing Management Body
76 2nd Street
Strathmore, AB
T1P 1J8
w)403 934-3474 ext 229
c)403 934-7523
f)403 934-4329
e-mail CAO@WHMB.ca

Sincerely,

Vickey Cook
CAO
Wheatland Housing Management Body



General

This Request for Proposals (RFP) is issued by Wheatland Housing Management Body for the services described in the Request for Proposal for External Audit Services. This competitive procurement will be conducted in accordance with one fundamental principle, the objective of which is to maximize the benefit to the Housing Body, while offering to the members of the Vendor community a fair and equitable opportunity to participate. The purpose for collecting the information for this RFP is to enable the Wheatland Housing Management Body to ensure the accuracy and reliability of, and to enable the Board of Directors to evaluate the Vendor's Proposal to this RFP and for other program purposes of the Wheatland Housing Management Body.

Vendor Questions

All questions shall be in writing and directed to the CAO of Wheatland Housing Management Body and Financial Coordinator.

Conflict of Interest

Vendors must fully disclose, in writing to the CAO of Wheatland Housing Management Body and Financial Coordinator.

Services on or before the closing date of this RFP, the circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest if the Vendor were to be contracted to provide the services pursuant to this RFP. The Board of Directors shall review any submissions by Vendors under this provision and may reject any proposals where, in the opinion of Wheatland Housing Management Body, the Vendor could be in a conflict of interest or could be perceived to be in a possible conflict of interest position if the Vendor were to be contracted to provide the services pursuant to this RFP.

RFP Closing

This RFP will close on September 5th, 2023, at 4:00 PM MST.

Proposal Rejection

The Board of Directors may reject the lowest cost Proposal, or any or all Proposals.

Incurred Costs

Wheatland Housing Management Body shall not be liable for any costs of preparation or presentation of Proposals. Vendors shall be responsible for all costs of preparing and presenting the Proposal.



Period of Commitment

Proposals shall be final and binding on the Vendor for acceptance by the Board of Directors for 30 days from the RFP closing date and time.

Pricing

Pricing shall include a total all-inclusive maximum price and contain all direct and indirect costs including all out-of-pocket expenses. Please include pricing for each year of the three year term.

Team Qualifications

Proposals are to include resumes, including references and location, of the key members of the project team.

Requirements

Wheatland Housing Management Body is requesting proposals pursuant to Section 14, 1-8 of the Alberta Housing Act for performance of the following services:

1. Preparation of the Financial Statements of Wheatland Housing Management Body for the calendar year ending December 31, 2023, to December 31, 2025.
2. Included in the audit, and not exclusive, are the following Audit tasks:
 - a. Audit the statements of financial position, operations, change in net financial assets, cash flow and schedules of changes in accumulated surplus, tangible capital assets and segmented disclosure in accordance with Canadian Public Sector Accounting Standards;
 - b. Special Audit - Social Housing
 - c. Provide WHMB with 12 copies of the audit report and draft financial statements for review by Council and one signed copy of approved financial statements;
 - d. Carry out all required duties to ensure that Wheatland Housing Management Body meets yearly audit and financial requirements.
3. Provide communications including:
 - a. Provide a written report based on an evaluation of current accounting policies and their applications, and include any new or alternative policies or methods unique to local government that should be considered;
 - b. Providing Board Members with comments and recommendations drawn to the Auditors attention intended for improvements in Wheatland County internal controls structure and operations. This may invoke attendance at a Board meeting for presentation of financial information and reports. Preparation and filing of required tax returns.



Preparation and filing of required tax returns.

Additional Information

Audit Timelines:

- a. Complete Audit – March, annually.

Future Considerations

Board of Directors will have the option to extend the service agreement for up to two (2) fiscal years ending December 31, 2026, and December 31, 2027.

Distribution

This Request for Proposals will be advertised and posted on the WHMB website. In addition, Requests for Proposals will be forwarded directly to:

1. SAR Professional Calgary Corporation
3535A 32nd St NE Calgary, AB
Phone 403 205-0897
2. Top Drawer Accounting
331 3 Ave. #102 Strathmore T1P 1T5
Phone 403 934-9696
3. Gregory, Harriman & Associates LLP
#104, 331-3rd Avenue, Strathmore, AB T1P 1T5
Phone: 403 934-3176
4. Bechthold & Becker Professional Accountants
62 Slater Road, Strathmore, AB T1P 1J3
Phone: 403 934-3316
5. Calvin Scott CPA, CA [Partner](#)
530 8 street S, Lethbridge, AB T1J 2J8
Phone 403 382-6800
calvin.scott@availcpa.com.