REQUEST FOR PROPOSALS (RFP)

EXTERNAL AUDIT SERVICES

Issue Date: August 31 2026

Proposal Submission

Electronic proposals must be submitted in PDF format to:

Simon Robichaud
Director of Finance
Inclusion Clare
finances@inclusionclare.com

Proposal Closing Date

September 18th 2026 **at 4:00 p.m. AST**

Late submissions will not be considered.

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1. INTRODUCTION

Inclusion Clare invites qualified Chartered Professional Accounting firms to submit proposals to provide annual external audit services for the organization.

The audit must be planned and performed in accordance with Canadian Auditing Standards and Accounting Standards for Not-for-Profit Organizations (ASNPO). The successful firm will provide an independent audit opinion on the annual financial statements of Inclusion Clare and provide recommendations regarding financial controls and reporting processes where appropriate.

Inclusion Clare is committed to transparency, accountability, and responsible stewardship of public funds and seeks an audit partner that understands the unique operating environment of community-based disability support organizations.

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2. ORGANIZATION OVERVIEW

Inclusion Clare is a registered non-profit organization located in Clare, Nova Scotia.

The organization provides services and supports to adults with disabilities through:

- Residential Services
  - Maison Jérôme
  - Maison d'Amis
- Independent Living Supports (ILS)
- Day Program Services
- Vocational and Employment Supports
- Community Inclusion Initiatives
- Social Enterprise Activities

Inclusion Clare receives funding from:

- Department of Opportunities and Social Development (DOSD)
- Provincial grants
- Municipal grants
- Fundraising initiatives
- Program-generated revenue

The organization currently operates multiple service locations and manages several funding streams requiring separate tracking and reporting. Financial records are maintained electronically through modern accounting systems and internal controls.

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3. TERM OF ENGAGEMENT

The Board of Directors intends to appoint an auditor annually at the Annual General Meeting.

The successful proponent will be offered an initial engagement for the fiscal year ending **March 31, 2027**, with the intention of establishing a relationship for up to **five years**, subject to:

- Annual Board appointment
- Satisfactory performance
- Compliance with agreed timelines

- Acceptable fee structure

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4. SCOPE OF SERVICES

The successful firm will be required to:

Audit Services

- Conduct an independent annual audit in accordance with Canadian Auditing Standards.
- Prepare audited financial statements in accordance with ASNPO.
- Review internal controls and identify opportunities for improvement.
- Conduct all audit planning, fieldwork, and reporting required to support the audit opinion.
- Provide an audit opinion suitable for inclusion in the organization's annual financial statements.

Management Letter

Provide a management letter annually outlining:

- Significant findings
- Internal control observations
- Recommendations for improvement
- Emerging risks or compliance concerns

Consultation Services

Provide reasonable consultation throughout the year regarding:

- Accounting standards
- ASNPO requirements
- Financial reporting matters
- Audit-related questions

Any services expected to incur additional charges beyond the agreed audit fee must receive prior written approval from Inclusion Clare.

Board and AGM Attendance

The successful firm will be required to:

- Present audited financial statements to the Board of Directors
- Attend Inclusion Clare's Annual General Meeting

- Present the audited financial statements to members
- Respond to questions from members and stakeholders

AGM attendance shall be included within the proposed audit fee.

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5. EXPECTED AUDIT TIMELINE

The following schedule is anticipated annually:

Activity	Timeline
Audit Planning Meeting	March
Year-End Working Papers Prepared	May
Audit Fieldwork	May-June
Draft Financial Statements	June
Final Audit Report and Management Letter	June
Board Presentation	June
AGM Presentation	July

Inclusion Clare staff will prepare year-end schedules, reconciliations, and supporting documentation to facilitate an efficient audit process.

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6. MINIMUM QUALIFICATIONS

To be considered, proponents must:

1. Be licensed Chartered Professional Accountants in Nova Scotia.
2. Maintain Professional Liability Insurance of not less than $2,000,000.
3. Have experience auditing not-for-profit organizations.
4. Demonstrate experience with government-funded organizations.
5. Have sufficient staffing resources to complete the engagement within required timelines.
6. Demonstrate continuity of audit personnel wherever possible.

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7. PROPOSAL REQUIREMENTS

Proposals must include:

A. Firm Profile

- Overview of the firm
- Office locations
- Number of professional staff
- Primary contact person

B. Relevant Experience

- Experience auditing non-profit organizations
- Experience with disability service providers
- Experience with provincially funded organizations
- Experience with organizations of similar size and complexity

C. Audit Team

Provide:

- Audit Partner
- Audit Manager
- Key staff assigned

Include qualifications and relevant experience.

D. Audit Methodology

Describe:

- Audit approach
- Risk assessment methodology
- Internal control review process
- Proposed schedule
- Expected staff involvement

E. Additional Services

Describe any value-added services available including:

- ASNPO guidance
- Tax advice

- Funding compliance support
- Governance or Board training opportunities

F. References

Provide three references from similar organizations.

Include:

- Organization name
- Contact person
- Position
- Phone number
- Email address
- Length of engagement

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8. FEE PROPOSAL

Proponents must provide a fixed-fee proposal using the following format:

Staff Classification	Hours	Rate	Fee
Partner			
Manager			
Senior Staff			
Support Staff			
Total Professional Fees			
Disbursements			
Total Fixed Fee			

Fees must include:

- Audit planning
- Fieldwork
- Financial statement preparation
- Management letter
- Board presentation
- AGM attendance and presentation

- Routine consultation throughout the year

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9. FEE ESCALATION REQUIREMENTS

Inclusion Clare seeks predictable and transparent pricing.

Accordingly:

- Preference will be given to firms providing fixed pricing for multiple years.
- Annual increases must be disclosed in the proposal.
- Proposed increases should not exceed the annual Consumer Price Index (CPI) unless justified.
- Additional billings outside the fixed fee require prior written approval.
- Inclusion Clare reserves the right to terminate or not renew the engagement where fee increases are deemed unreasonable.

Proponents are encouraged to provide pricing for each year of a five-year term.

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10. EVALUATION CRITERIA

Criteria	Points
Understanding of Inclusion Clare and Engagement	10
Not-for-Profit Experience	15
Audit Team Qualifications	15
Audit Methodology and Implementation	20
Value-Added Services	10
References	10
Fee Proposal	20
Total	**100**

Shortlisted firms may be invited to participate in an interview.

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11. CONDITIONS

Inclusion Clare reserves the right to:

- Reject any or all proposals
- Accept a proposal other than the lowest-cost submission
- Request additional information
- Negotiate terms with the preferred proponent
- Cancel the RFP process at any time

All proposal preparation costs are the responsibility of the proponent.

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12. CONTACT INFORMATION

Questions regarding this RFP should be directed to:

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