



REGIONAL DISTRICT
of Fraser-Fort George



Fraser-Fort George
REGIONAL HOSPITAL
DISTRICT

REQUEST FOR PROPOSALS FS-15-01

REGIONAL DISTRICT OF FRASER-FORT GEORGE
and
FRASER-FORT GEORGE REGIONAL HOSPITAL DISTRICT
for
AUDIT SERVICES

Closing Date: July 17, 2015



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REQUEST FOR PROPOSALS FS-15-01

AUDIT SERVICES

1.0 INVITATION AND INSTRUCTIONS

The Regional District of Fraser-Fort George and the Fraser-Fort George Regional Hospital District, (collectively the "Regional District", unless otherwise specified) invite proposals for audit services (the "Audit Services").

Three (3) complete copies of your Proposal must be submitted in a sealed package marked: "**RFP FS-15-01 Audit Services**" to be received by:

General Manager of Financial Services
Regional District of Fraser-Fort George
3rd Floor, 155 George Street
Prince George, BC V2L 1P8

up to **2:00 p.m. local time, Friday, July 17, 2015**. Responding proponents must have their name and full mailing address clearly marked on the outside of the Proposal package. Late proposals will not be accepted and will be returned unopened to the Proponent. **Facsimile proposals will not be accepted.**

To be considered, proposals must be signed by an authorized signatory of the Proponent. By signing the Proposal, the Proponent is bound to statements made in response to this Request for Proposals, (this "RFP"). Any proposal received by the Regional District that is unsigned will be rejected.

The Proponent will be competent and capable of providing the Audit Services. The Proponent may be required to provide evidence of previous experience and financial responsibility before a contract is awarded.

The Regional District will not be responsible for any costs incurred by proponents which result from the preparation or submission of documents pertaining to this RFP. The accuracy and completeness of the Proposal is the Proponent's responsibility. Should errors be discovered, they will be corrected by the Proponent at their expense.

RFP documents may be obtained on, or after, Monday, June 29, 2015:

- a) in a PDF (public document format) file format from the Regional District's website at www.rdffg.bc.ca;
- b) on the BC Bid[®] website www.bcbid.gov.bc.ca; or
- c) in hard copy from the Regional District Service Centre, 155 George Street, Prince George, BC between 8:00 a.m. and 5:00 p.m., Monday through Friday, excluding statutory holidays.

All subsequent information regarding this RFP, including amendments, addenda, and answers to questions, will also be available as above.

All questions relating to this RFP must be directed to:

Natalie Wehner, General Manager of Financial Services, (the "GM")
Regional District of Fraser-Fort George
3rd Floor, 155 George Street
Prince George, BC V2L 1P8

Telephone: 250-960-4436 / Toll Free 1-800-667-1959 / Fax: 250-563-7848 / Email: nwehner@rdffg.bc.ca

2.0 INTRODUCTION AND BACKGROUND

The Regional District of Fraser-Fort George is a municipal government incorporated pursuant to the *Local Government Act* of British Columbia. Its assets and liabilities belong to the electorate (residents and property owners) within the geographic boundaries of the Regional District of Fraser-Fort George. Similar to the manner in which Canada is made up of provinces and territories, the Regional District of Fraser-Fort George is a federation of municipalities and electoral areas.

The Fraser-Fort George Regional Hospital District was established in 1967, and shares the same boundaries, directors and administrative staff as the Regional District of Fraser-Fort George. The Fraser-Fort George Regional Hospital District operates under the authority of the "*Hospital District Act*".

3.0 PURPOSE, OBJECTIVE AND INTENTION

The intention of this RFP is to award a contract, (the "Contract") to the successful proponent, (the "Auditor") who can demonstrate the ability to supply and deliver a high quality product that meets or exceeds the specifications contained within this RFP.

4.0 GENERAL INFORMATION AND INSTRUCTIONS TO PROPONENTS

4.1 Discrepancies or Omissions

Proponents finding discrepancies, errors, or omissions in this RFP, or requiring clarification on the meaning or intent of any part herein, should immediately request, in written form, either by mail, fax, or email, clarification from the GM. No responsibility will be accepted for oral instructions. Any work done after discovery of discrepancies, errors or omissions, will be done at the Proponent's risk.

4.2 Proposal Submissions

Three (3) signed copies of each proposal shall be submitted. Each copy shall be complete and shall not refer to any other copy for additional information, clarification, or details.

Proposals submitted by fax, electronically, or not in the Proposal Format, see section 9.0, will **NOT** be accepted.

Proposals not submitted in strict accordance with these instructions or not complying with the requirements in this RFP may be rejected.

The Regional District will not be responsible for any costs incurred by proponents as a result of the preparation or submission of a proposal pertaining to this RFP. The accuracy and completeness of the Proposal is the Proponent's responsibility. Should errors be discovered, they will be corrected by the Proponent at their expense.

Any proposal received after the closing date and time (Friday, July 17, 2015 at 2:00 p.m.) will be considered disqualified and will be returned unopened to the Proponent.

4.3 Regional District's Right to Reject Proposal

The Regional District reserves the right, in its sole discretion, to waive informalities in proposals, reject any and all proposals, or accept the proposal deemed most favourable in the interests of the Regional District. The lowest, or any proposal, will not necessarily be awarded.

If a proposal contains a defect, or fails in some way to comply with the requirements of this RFP which, in the sole discretion of the Regional District, is not material, the Regional District may waive the defect and accept the Proposal.

The Regional District reserves the right to reject a proposal based on potential or perceived conflict of interest.

The Regional District reserves the right to reject any proposal where:

- a) one or more of the directors, officers, principals, partners, senior management employees, shareholders or owners of the Proponent, is an officer, employee or director of the Regional District, or is a member of the immediate family of an officer, employee or director of the Regional District; or
- b) in the case of a proposal submitted by a proponent who is an individual person, where that individual is an officer, employee or director of the Regional District, or is a member of the immediate family of an officer, employee or director of the Regional District.

By submitting a proposal, the Proponent confirms that clauses a) and b) above are not applicable.

The Regional District reserves the right to reject any proposal submitted by a Proponent who is, or whose principals are, at the time of proposing, engaged in a lawsuit against the Regional District in relation to work similar to that being proposed.

5.0 CLAIM FOR COMPENSATION

No proponent shall have any claim for compensation of any kind whatsoever as a result of participating in this RFP.

In the event that the previous paragraph is found to be invalid by a court of competent jurisdiction, then this paragraph will apply. By submitting a proposal, a proponent agrees that they will not claim damages in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing their Proposal for matters relating to this RFP or in respect of the competitive proposal process, and the Proponent, by submitting a proposal, waives any claim for loss of profits if a contract is not entered into with the Proponent.

6.0 SCOPE OF WORK

The scope of the work is to supply and deliver the Audit Services as detailed in Appendix “A” – Scope of Work.

7.0 SPECIFICATIONS

The minimum requirements for the Audit Services are detailed in Appendix “A” – Scope of Work. Prospective proponents may recommend changes or adjustments to the specifications outlined where the Proponent believes that such changes or adjustments will result in a better quality product. In all cases, the Proponent should provide reasons for the recommended changes or adjustments to the RFP specifications.

8.0 PAYMENT

8.1 Contract Price

All prices for the Audit Services, including supply and delivery, shall be stated in Canadian dollars. Any applicable Federal or Provincial taxes, or levies, must be included in the Proposal, but are to be listed separately from the contract price. Appendix “B” – Schedule of Prices must be completed and included in the Proposal package. The contract price must be open for acceptance for sixty (60) days.

8.2 Total All Inclusive Maximum Price

The proposal should contain all pricing information relative to performing the Audit Services as described in this RFP. The proponent’s price is to contain the price for the Audit Services as well as all direct and indirect costs including all reimbursable expenses. Changes in wording or presentation of financial statements, notes or schedules, suggested or requested by the Auditor during the course of any audit will not be considered as additional services.

In the event that invoices are rendered that are in excess of the fees quoted in the final signed Contract, payment will not be made unless the additional deliverables have been negotiated with and accepted by the Regional District in advance of the conduct of the work.

8.3 Rates for Additional Services

During the period of this Contract, additional audit services may be required to address new legislated requirements. As the extent of these additional services is not known, the Regional District is requesting that Proponents set out in their own words and format, the approach that will be taken to ensure the charges for these additional services are as cost effective as possible.

9.0 PROPOSAL FORMAT

Proponents are asked to respond in a similar manner and submit three (3) copies of their Proposal. The following format and sequence, with all pages consecutively numbered, is to be followed in order to provide consistency in proposals and to ensure each proposal receives full and complete consideration.

- a) Title page, including RFP title and number, Proponent's name and address, telephone number, fax number, email address, and the name of the Proponent's representative.
- b) One page Letter of Introduction SIGNED by the authorized signatory of the Proponent which will bind the statement(s) made in the Proposal.
- c) Table of Contents including page numbers.
- d) An Executive Summary of the key features of the Proposal.
- e) Statement of Understanding.
- f) Three (3) references with complete contact information for the supply and delivery of similar auditing services (see section 9.1).
- g) Schedule of Prices - Appendix "B".
- h) Additional information that the Proponent may choose to provide.
- i) **All amendments and addenda, if any, issued for this RFP. Each amendment and addenda must be signed by the Proponent and included with the Proposal and will form part of the Proposal documents.**

9.1 References

Proponents should identify a minimum of three (3) local government clients for which the Auditor has performed financial audit services in the last five (5) years, complete with the name of the organization's chief financial officer and contact information.

9.2 Firm Qualifications and Experience

The Proponent should state the:

- size of the firm;
- size of the firm's governmental audit staff;
- location of the office from which the Audit Services are to be performed;
- number and nature of the professional staff to be employed on a full-time basis;
- number and nature of staff to be employed on a part-time basis; and
- firm's local government auditing knowledge and experience.

9.3 Partner, Supervisory and Staff Qualifications and Experience

The Proponent should identify the principal supervisor and management staff, including engagement partners, managers, other supervisors and specialists that would be assigned to perform the Audit Services. Other audit personnel may be changed at the discretion of the Proponent, provided that replacements have substantially the same or better qualifications or experience.

9.4 Specific Audit Approach

Provide a statement of understanding of the work to be performed, audit approach and commitment to perform the work within the time period specified in the annual schedule.

Describe the methodology to be used for keeping the Regional District abreast of any changes. Describe the Proponent's experience in providing additional services to government and a description of the nature of such services.

10.0 PROPOSAL EVALUATION AND SELECTION PROCESS

All proposals will initially be evaluated by the Regional District to assess the qualifications and capabilities of proponents to meet the minimum standards specified in this RFP.

Evaluation of proposals will be by a committee formed by the Regional District in order to provide a recommended award of the Contract. The proposals will be evaluated on established criteria which will include the Proponent's qualifications and experience, quality of product, contract price, supply, delivery and dates. The Proposal should be clear, concise, and complete.

The following proposal evaluation methodology will be used by the committee to evaluate the proposals received:

	CRITERIA	WEIGHT	SCORE OUT OF 100	WEIGHTED SCORE
A.	Understanding the entity and the work to be performed: <ul style="list-style-type: none"> demonstrated understanding of Regional District structure and governance demonstrated understanding of the work to be performed 	5%		
B.	Experience with local government audits: <ul style="list-style-type: none"> Proponent's local government auditing experience 	15%		
C.	Experience and qualifications of audit team: <ul style="list-style-type: none"> qualifications of audit manager and staff local government audit experience of audit manager and staff planned continuity of audit manager and staff 	40%		
E.	Proposal quality and clarity	5%		
F.	References: <ul style="list-style-type: none"> minimum of three (3) references 	5%		
G.	Audit fees and other charges: <ul style="list-style-type: none"> proposed all inclusive audit fees for the Regional District 	30%		
	TOTAL:	100%		

Throughout the evaluation process, the Regional District, in its sole discretion, may request additional written clarification and/or supplemental information from selected proponents as part of the evaluation process.

11.0 CONTRACT SCHEDULE

11.1 Form of Contract

The Contract to supply and deliver the Audit Services will be in the form of a letter of proposal acceptance, purchase order, or other format as agreed upon by the Regional District and the successful proponent, and will include this RFP, all appendices, amendments and addenda.

11.2 Award of Contract

The Contract is expected to be awarded not later than Thursday, August 20, 2015. The Regional District may delay the date of awarding the Contract if deemed appropriate by the Regional District.

The successful proponent will be notified of acceptance of its proposal by notification, in writing, delivered to the address on the Proposal. No other communication will constitute acceptance of any proposal.

All proponents will be advised, in writing, as to the awarding of the Contract.

12.0 COMPLIANCE WITH LAWS

The Auditor will give all the notices and obtain all the licenses and permits required to perform the work and provide written confirmation that the Auditor's and sub-contractor's personnel are fully certified to perform the work. The Auditor will comply with all laws, regulations and requirements of authorities having jurisdiction applicable to the work or performance of the Contract.

13.0 LAWS OF BRITISH COLUMBIA

Any contract resulting from this RFP will be governed by, and will be construed and interpreted in accordance with, all laws in effect in the Province of British Columbia.

14.0 RIGHT TO TERMINATE SERVICES

The Regional District may terminate any or all services upon thirty (30) days written notice. If such notice is given, the Regional District will pay only for time and expenses incurred by the Auditor up to the termination date and for any reasonable time and expense incurred to bring the Audit Services to a close in a prompt and orderly manner.

15.0 INDEMNITY

Notwithstanding the provision of insurance coverage by the Auditor, the Auditor hereby agrees to indemnify and save harmless the Regional District, its officers, agents, and employees from and against all claims, demands, losses, costs, damages, actions, suits or proceedings by whomever made, brought or prosecuted and in any manner based upon, arising out, related to, occasioned by or attributable to the activities of the Auditor, its servants, agents, sub-contractors and sub-operators, in providing the Audit Services and performing the work of the Contract, excepting always liability arising solely out of the negligent act or omission of the Regional District.

16.0 INSURANCE

The Auditor, without limiting its obligations or liabilities, and at its own expense, must provide and maintain throughout the Contract term, the following insurances with insurers licensed in the Province of British Columbia in forms acceptable to the Regional District. All required insurance (except automobile insurance on vehicles owned by the Contractor) shall be endorsed to show the Regional District as additional insured and provide the Regional District with 30 days' advance written notice of cancellation or

material change. The Auditor must provide the Regional District with evidence of the required insurance, in a form acceptable to the Regional District, upon notification of award and prior to the execution and delivery of the Contract:

1. Commercial General Liability (CGL), written on an occurrence based form, in an amount not less than \$3,000,000 inclusive per occurrence insuring against bodily injury and property damage and including liability assumed under the Contract. The Regional District is to be added as an additional insured. Such CGL coverage shall include the following liability extensions: Contingent Employers Liability, Cross Liability Cover, Broad Form Products & Completed Obligations, Personal Injury, Blanket Contractual, and Cross Liability.
2. Automobile Liability on all vehicles owned, operated, or licensed in the name of the Contractor in an amount not less than \$3,000,000.

17.0 REGISTRATION WITH WORKSAFEBC

The Auditor shall abide by all provisions of the *Workers Compensation Act* and its regulations and may be required to sign a WorkSafeBC Safety Covenant in the form provided by the Regional District. The Auditor must be a registrant in good standing at all times with WorkSafeBC for the duration of the Contract. Prior to receiving any payment, the Auditor may be required to submit a WorkSafeBC Clearance letter confirming all assessments have been paid and the Auditor is in good standing.

18.0 OWNERSHIP OF PROPOSALS AND FREEDOM OF INFORMATION

Proposals will be received and held in confidence by the Regional District, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and this RFP.

All documents, including proposals, submitted to the Regional District become the property of the Regional District. The Regional District will provide a debriefing for proponents, upon request by a proponent, subject to the *Freedom of Information and Protection of Privacy Act*.

19.0 RIGHTS OF WAIVER

A waiver, or any breach of provision of this RFP will not constitute or operate as a waiver, or any other breach, of any other provisions, nor will any failure to enforce any provision herein operate as a waiver of such provisions or of any other provisions.

20.0 SEVERABILITY

All paragraphs of the Contract are severable one from the other. Should a court of competent jurisdiction find that any one or more paragraphs herein are void; the validity of the remaining paragraphs hereof will not be affected.

APPENDIX “A” - SCOPE OF WORK

1. Background

The Regional District of Fraser-Fort George (“RDFFG” for the purposes of the Scope of Work) is governed by a fourteen (14) member board including representation from four (4) member municipalities and seven (7) rural areas. The 2015 operating budget is approximately \$41.4 million with an additional \$7.1 million capital budget. The RDFFG provides eighty-eight (88) services, ranging from small local services such as a series of street lights in a rural area to large and complex services such as Solid Waste Management and 9-1-1 Emergency Communications which are administered through a number of business units: Community Services, Corporate Services, Development Services, Environmental Services and Financial Services.

The Fraser-Fort George Regional Hospital District (“RHD” for the purposes of the Scope of Work) shares the same boundaries, directors and administrative staff as the RDFFG. The 2015 operating budget is approximately \$4.4 million with an additional \$2.3 million capital budget.

To assist in the preparation of the proposal, the following documents can be obtained from the RDFFG’s website: www.rdffg.bc.ca.

- RDFFG’s 2015 Five Year Financial Plan and the RDFFG’s 2014 Statement of Financial Information (*Services / Financial / Budgets*)
- RHD’s 2014 Financial Statements and 2015 Budget (*Government / Regional Hospital District*)

A copy of the RDFFG’s 2014 returns and additional information may be provided upon request.

The chart of accounts contains approximately 3,000 active accounts. The RDFFG issued approximately 7,300 accounts payable cheques in 2014. Taxation collected for 2014 was approximately \$17.8 million. The RDFFG has approximately 85 employees of which 58 are full time. Employees are paid by direct deposit.

The RDFFG and RHD currently use Vadim, iCity as the accounting and budgeting software. Caseware is used to produce lead sheets and financial statements for the RDFFG and RHD.

2. Scope of Services

General:

In compliance with the *Local Government Act*, the RDFFG and RHD Boards will appoint an audit firm for the Audit Services.

Scope of Services:

Commencing with the 2015 fiscal year, audit services are required for the RDFFG and the RHD.

The audit must be in accordance with generally accepted auditing standards in order to express an opinion on the fair presentation of both the RDFFG and RHD consolidated financial statements and supplementary information, in conformity with generally accepted accounting principles and provisions of the *Community Charter* of British Columbia.

3. Annual Schedule

Prior to the commencement of any work in each year of the Contract, the Auditor will correspond with the RDFFG to discuss and agree upon a schedule of activities which will lead to the completion of the annual audit. This schedule will set out the key dates by which work is to be completed by both parties, and may include the following:

- interim audit (typically in November of each year);
- requirements letter, provided by the Auditor to the RDFFG outlining specific items to be included with the audit working papers and levels of materiality;

- year-end trial balance provided by the RDFFG staff to the Auditor approximately one (1) week prior to the year-end audit;
- draft consolidated financial statements, provided by the RDFFG and RHD to the Auditor, approximately one (1) week prior to commencement of the year-end audit;
- year-end audit, (typically in the first week of March); and
- audit report and presentation to the RDFFG's Board (typically in April).

4. Qualified Statement

The Auditor shall immediately upon discovery of information or conditions, which would otherwise lead to the inclusion of a qualified opinion with respect to the financial statements, inform and fully discuss such matters with the appropriate RDFFG staff. In addition, the Auditor, shall as far in advance as possible, allow a reasonable period of time for RDFFG staff to make an investigation, analyze, report and take such corrective action as to avoid the inclusion of such qualification.

5. Audit Report and Management Letter

The audit process includes final approval of the RDFFG and RHD annual financial statements prepared by RDFFG staff.

The Auditor's reports, duly signed by the Auditor shall be delivered to the RDFFG and RHD by the deadlines set out in the annual schedule.

The RDFFG and RHD wish to be advised of any weaknesses to internal controls, or other area of concerns, noted during the audit prior to the Management Letter being issued.

The Auditor shall issue a written notice on the fair presentation of the consolidated financial statements or financial statements on conformity with generally accepted accounting principles, suitable for printing within the financial statements.

The Auditor shall issue a separate written opinion on the supplementary information accompanying the consolidated financial statements or financial statements, suitable for printing within the financial statements.

The Auditor shall communicate in a post audit report, in the form of a Management Letter, to the RDFFG and RHD Boards, any reportable conditions, as determined by the Auditor, found during the audit.

The Auditor, as directed by the RDFFG Board, will respond to and discuss with the staff of the RDFFG, the contents of the post audit Management Letter. Upon agreement as to the factual accuracy of the observations, a revised Management Letter, if necessary, shall be submitted to the RDFFG and RHD Boards. The Auditor shall also provide appropriate beneficial suggestions to correct any areas of concerns and weaknesses arising as a result of the audit process.

6. Meetings and Other Services

The Auditor will be required to do an annual presentation to the RDFFG Board on the financial statements and audit, no later than the end of April of the year ended as set out by the annual schedule.

The Auditors will respond to, and discuss with, RDFFG staff any accounting, auditing, tax and other issues arising throughout the year. It is expected that such inquiries, unless leading to significant extra work, are within this Scope of Work and will not incur additional fees.

7. Work to be Provided by RDFFG Staff

The financial statements for the RDFFG and RHD, in conformity with the Public Sector Accounting Board requirements, will be prepared by RDFFG staff in Caseware complete with required working papers. The preparation and provision of these working papers will be based on the annual schedule dates.

Preparation of year-end working papers for both the RDFFG and RHD including:

- supporting working papers for all significant asset and liability accounts;
- comparative analysis of current and prior actual;
- comparative analysis of current actual to current budget; and
- audit confirmations to banks, lawyers and other entities as required upon receipt of forms from the Auditor.

Preparation of Provincial Statement of Financial Information is done by RDFFG staff.

RDFFG staff, and responsible management personnel, will be available during the audit to assist the Auditor by providing overview information and explanations.

APPENDIX “B” - SCHEDULE OF PRICES

The total price submitted below reflects the full cost, including taxes, in Canadian dollars for the Audit Services as specified in RFP FS-15-01. This Schedule of Prices must be completed, signed and accompany the Proposal submitted.

Regional District of Fraser-Fort George:

Fiscal Year	2015	2016	2017	2018	2019
Fees	\$	\$	\$	\$	\$
Taxes					
Total:	\$	\$	\$	\$	\$
Hourly rate for additional services (attach separately if necessary)					\$
Other charges (attach separately if necessary)					\$

Fraser-Fort George Regional Hospital District:

Fiscal Year	2015	2016	2017	2018	2019
Fees	\$	\$	\$	\$	\$
Taxes					
Total:	\$	\$	\$	\$	\$
Hourly rate for additional services (attach separately if necessary)					\$
Other charges (attach separately if necessary)					\$

Proponents should ensure that all requirements of this RFP are dealt with in their Proposal and that all materials and products proposed comply with the specifications therein.

GST Tax Registration Number: _____

PST Tax Registration Number: _____

WorkSafeBC Registration Number: _____

Delivery Date: _____

 Authorized Signatory Signature

 Name of Proponent

 Name (Please print)

 Address

 Title

 City, Province, Postal Code

 Phone Number

 Fax Number

 Email

 Date

APPENDIX “C” - PROPOSAL CHECKLIST

Before submitting your Proposal, check the following points:

- Is the Proposal complete?
 - a) Title page
 - b) One page Letter of Introduction
 - c) Table of Contents
 - d) Executive Summary
 - e) Statement of Understanding
 - f) References
 - g) Appendix “B” – Schedule of Prices
 - h) Additional information, if any
 - i) Amendments and Addenda, if any

- Are there three (3) complete copies of your Proposal?

Note: The Proposal may be disqualified if ANY of the applicable foregoing points have not been complied with.

Ensure that the Proposal is returned in a **sealed** envelope clearly marked on the outside with:

- Attention: General Manager of Financial Services
Regional District of Fraser-Fort George
3rd Floor, 155 George Street
Prince George, BC V2L 1P8
- RFP FS-15-01 - Audit Services
- Proponent’s name and mailing address