



ATLANTIC
PLANNERS
INSTITUTE
INSTITUT DES
URBANISTES DE
L'ATLANTIQUE

5707 St Peters Rd
St Peters PE
COA 2A0
(902) 704-2401

www.atlanticplanners.org

February 10, 2021

Atlantic Planners Institute (API) invites proposals from qualified accounting firms for professional services for an annual financial review for API. The reviewer will be responsible for the following:

- Performing an annual review in accordance with generally accepted standards, which will include advice on internal control and related procedures.
- Attending meetings (either in-person or through electronic means) with Atlantic Planners Institute staff and as required for establishing the review process and planning, executing and reporting on the review of the financial statements.
- Discussing with and advising API staff on accounting, auditing and tax issues that may arise during the year.
- Completing and filing annual tax returns on behalf of API.

The service period is for a three-year term, renewable annually, beginning with the fiscal year ending on December 31, 2022. The appointment of the reviewer is subject to the approval of the API Board of Directors.

1. CLIENT BACKGROUND

The Atlantic Planners Institute / Institut des Urbanistes de l'Atlantique (API) is a not-for-profit corporation organized under the *Canada Not-for-profit Corporations Act*. API is an association of professional planners in the four Atlantic provinces of Canada: New Brunswick, Newfoundland and Labrador, Nova Scotia, and Prince Edward Island. API is associated with the Canadian Institute of Planners and provides membership services to the four Provincial Associations:

- Newfoundland and Labrador Association of Professional Planners
- New Brunswick Association of Planners
- Licensed Professional Planners Association of Nova Scotia
- Prince Edward Island Association of Planners

The Institute is established as an organization-of-organizations model, with the four Provincial Associations constituting the four voting members. Individual Professional Planners within the four provinces are non-voting corporate members. With approximately 320 members across these four provinces, API provides a strong foundation for professional planners to network nationally, increase their skill set, and stay up-to-date with constant changes in the environment. Atlantic Planners Institute regularly promotes the planning profession and provides opportunities and resources for members to advance in their careers.

Annual revenues [in the form of membership and conference fees) are expected to be between \$100,000 and \$150,000 per year. Administration of the organization is carried out by AOR Solutions (a trade name of Jay Adamsson Consulting Inc.) under contract. The corporation's fiscal year runs from January 1 to December 31. Annual reviews must be completed by April 30 to ensure that financial statements are available for the Annual General Meeting.

API currently uses Sage Business Cloud to record income and expenses.

2. INSTRUCTIONS TO RESPONDENTS

2.1 Proposals

All proposals regarding this RFP must be made in writing and emailed to:

Michelle L. MacDonald
Executive Director
Atlantic Planners Institute
5707 St Peters Rd.
St Peters, PE COA 2A0
Email: executivedirector@atlanticplanners.org

Proposals must be received no later than 5:00 PM EDT on March 2, 2021. Proposals received after this time will NOT be considered during the selection process. API is not responsible for submissions which are delivered to any other email address or physical location other than requested in this RFP.

2.2 Addenda

If deemed necessary by API, responses to any questions and/or any additional information will be issued by the corporation in the form of an Addendum, which shall form part of this RFP. No oral conversation will affect or modify the terms of this RFP or may be relied upon by any respondent.

All addenda shall be issued and posted to the API website at <https://atlanticplanners.org/jobs/call-for-rfps-financial-services/>

It is the responsibility of the respondent to review all addenda prior to the proposal submission deadline. Upon submitting a proposal, a respondent will be deemed to have received all addenda that have been issued.

2.3 Clarity and Organization of Proposals

Proposals should be complete, clear, consistent, well organized and legible to facilitate evaluation. All information requested in this RFP should be provided in your proposal.

3. GENERAL CONDITIONS

3.1 Cost of Proposal

Preparation and submission of a proposal in response to this RFP is voluntary and any costs associated with the proposal preparation, submission, meetings, negotiations or discussions with API are solely the responsibility of the respondent submitting the proposal.

3.2 Acceptance of Proposal

API reserves the right to accept or reject any or all proposals received in response to this RFP.

API reserves the right to conduct personal interviews with selected respondents and contact the references provided under section 4 of this RFP.

3.3 Evaluation Criteria for Proposals

API will conduct an evaluation of each proposal received in response to this RFP using the following criteria:

- Completeness, thoroughness and relevance of the proposal submitted in response to the RFP.
- Demonstrated ability and experience in reviewing other not-for-profit organizations of a similar size and complexity.

- Cost of services to be provided and other value-for-money services bundled with the review.
- Background and stability of the accounting / audit firm.

The above list is indicative only; it is not exhaustive, and the items are not ranked in order of preference or priority.

4. PROPOSAL CONTENT

All proposals should contain the following information about the proposed reviewer:

- A list of current and prior not-for-profit or public sector clients including the number of years of service on each and the name, telephone number and email address of two (2) contacts for reference.
- Related professional services that your firm provides, and any innovative products offered by your firm of potential relevance to API.
- The firm's independence with respect to API.
- Cost of services including:
 - An estimate of the total hours of work required to complete the financial review, broken down by major anticipated tasks as applicable.
 - The hourly billing rates for each category of staff assigned to work on the API financial review.
 - Other identified additional costs or disbursements, and how these will be charged.
 - A pricing structure for special work could be included.
- In addition, API welcomes your comments on:
 - Innovative ways to reduce review fees and streamline the review process.
 - Approach to fee negotiation for additional or unplanned work.
 - Strategies to familiarize the review team with the operations of API.
 - Strategies to maintain continuity of the review team and provide an appropriate level of senior management involvement in the review, while minimizing review team staff costs.
 - Quality assurance/control processes employed by the firm to ensure effective product and service delivery.

Please submit your response to this request for proposal by March 2, 2021. We would also appreciate a response if you decline to submit a proposal.

Sincerely,

Ms. Michelle L. MacDonald
Executive Director
Atlantic Planners Institute
executivedirector@atlanticplanners.org
(902) 704-2401