



**CORPORATION OF THE CITY OF ENDERBY
REQUEST FOR PROPOSAL**

FINANCIAL AUDIT SERVICES

Proposals will be received no later than:

3:00 PM, WEDNESDAY SEPTEMBER 2, 2026

Addressed to: Jennifer Bellamy
Chief Financial Officer
City of Enderby
PO Box 400 (619 Cliff Ave)
Enderby BC, V0E 1V0

jbellamy@cityofenderby.com

Term: Fiscal year ending December 31, 2026 to December 31, 2028 (with a potential extension)

CITY OF ENDERBY REQUEST FOR PROPOSALS FINANCIAL AUDIT SERVICES

Introduction

The City of Enderby (City) invites qualified audit firms to submit proposals to perform the annual financial audits for the City.

Audits must be planned and executed in accordance with Canadian auditing standards and the provisions of the *Local Government Act* and *Community Charter*. The audit will result in an opinion to the City's Council as to the fairness of the annual financial statements and related schedules.

The Auditor must have experience and expertise in performing municipal audits, be free of any obligations or interests that may conflict or affect their ability to perform and act as the Auditor of the City, and have the capacity to provide this service in a timely manner.

All inquiries regarding this RFP are to be directed to:

Jennifer Bellamy, Chief Financial Officer

Email: jbellamy@cityofenderby.com

Phone: 250-838-7230

Term

The successful proponent will be appointed to provide audit services for the fiscal years 2026-2028, with an option to extend the engagement for an additional two years.

Acceptance of Proposals

The City reserves the right to reject any and all Proposals for any reason or to accept any Proposal on the basis of Proposals received which the City, in its sole unrestricted discretion, deems most advantageous to itself. The Proposal with the lowest fee will not necessarily be accepted. The Proponent acknowledges the City's rights under this clause and waives any right of action against the City's failure to accept its Proposal. The acceptance of any Proposal is subject to approval by the City's Council.

Proposal Costs

Proponents are solely responsible for their own expenses in preparing and submitting a Proposal. The City will not be liable for any claims for costs or damages incurred by a Proponent in preparing a proposal.

Proposal Validity

Proposals will remain open for acceptance for at least 30 days after the closing to provide the City with sufficient time to evaluate the Proposals and award the contract.

Insurance

The Auditor shall maintain professional liability insurance for audit and accounting services, including errors and omissions, with a limit of not less than \$1,000,000 per occurrence with respect to the Services alone. The Auditor shall, without limiting its obligations or liabilities and at its own expense, provide and maintain insurance for its own equipment and continuously carry insurance with insurers licensed in British Columbia. The Proponent is responsible for all insurance costs (as required by law). The Proponent will provide verified copies of required policies upon request.

WorkSafe BC

The Auditor will be registered with WorkSafe BC and maintain WorkSafe BC coverage for the duration of the engagement. The Auditor will abide by all provisions of the *Workers Compensation Act* of British Columbia. It is a condition of contract that the Auditor must remain in good standing throughout the term of any contract between the City and the Auditor.

Experience and Qualifications

The Proponent must meet the following minimum requirements to be considered for evaluation pursuant to this RFP:

1. Completed a municipal audit of similar size and scope (or greater) within the last three years.
2. Have sufficient staffing, facilities, financial resources and expertise to perform the services.
3. Assigned supervisory staff must hold a valid accounting designation and have previous experience in performing municipal audit engagements.
4. Demonstrate a commitment to providing reasonable annual continuity of experienced and qualified personnel.

Background Information

The Corporation of the City of Enderby was incorporated in 1905 and is located in the North Okanagan. The current population is estimated to be 3,028 (2021 Statistics Canada).

The City is governed by a seven-member elected Council including a Mayor, with one member appointed to sit on the board of the Regional District of North Okanagan.

The City's 2026 operating budget is approximately \$6.4 million and capital expenditures vary annually depending on external grant funding. The \$6.9 million capital budget for 2026 is larger than typical due to the completion of a new outdoor pool facility of \$4.5 million. Major services provided include general government, roads, water and sewer services, garbage collection, cemetery services, tourism (including a municipal campground), and parks and recreation services.

The City uses the non-cloud based Vadim/ICity Financial software package, along with Caseware Financials to prepare audit working papers and financial statements. Payroll is processed internally. The City utilizes excel spreadsheets for budgeting and tangible capital assets.

Other estimated information for 2026 unless otherwise noted:

Number of property rolls	1,589
Number of general ledger accounts	519
Number of utility accounts	1,580
Number of full-time employees	14
Number of casual employees	4
Estimated gross payroll	\$ 1,400,000
Number of AR invoices issued (2025)	493
Number of AP payments issued (2025)	1,540

The City has a volunteer fire department of approximately 23 members, which are paid once a year in November.

The City is the administrator for services provided for by the Enderby & District Services Commission (the Commission). The Commission provides Animal Control, Cemetery and Parks and Recreation services which are shared services through the City and Electoral Area F.

The 2025 Annual Report along with the 2025 Audited Financial Statements can be found at:

<https://www.cityofenderby.com/city-of-enderby-2025-annual-report/>

Audit firms who are considering a Proposal pursuant to this request are encouraged to visit the City's website at www.cityofenderby.com for a more detailed overview of the City's characteristics and activities.

SCOPE OF SERVICES

Services

The Auditor will, in accordance with Canadian generally accepted auditing standards and the provisions of the *Local Government Act* and the *Community Charter*, examine the financial records, systems and controls of the City of Enderby. The Auditor will then provide written audit reports with an audit opinion on the consolidated financial statements as prepared by City staff for the City of Enderby.

The Auditor's report should be suitable for printing within the statements and be addressed to the Council of the City of Enderby. The Auditor will be required to attend a meeting of Council to present and explain as necessary the audit reports and audit opinion.

The Auditor will ensure all new or changed reporting requirements and auditing standards are communicated to the City in writing to ensure that financial statements and notes prepared by management are in compliance with current reporting requirements and auditing standards.

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 Chief Financial Officer (or designate). In addition, the Auditor shall as far as possible, allow a reasonable period of time for City staff to make an investigation, analyze, report and take such corrective action to avoid the inclusion of such qualification.

Annual Audit Schedule

Prior to October 15th of each year, the Auditor shall correspond with the Chief Financial Officer (or designate) to discuss and agree upon a schedule of activities which will lead to the completion of the annual audit. The basic timeline will be as follows:

- Interim audit mid-October to mid-December of each year
- Year-end audit, within March to April of each year
- Audit report and presentation to Council, by May 10th of each year.

City staff will be responsible for the year-end close and financial statement preparation. City staff will assist the Auditor by preparing a full set of working papers, schedules, a trial balance and supporting documentation on a timely basis.

AUDIT PROPOSALS

Proposal Requirements

A covering letter shall be provided with the proposal clearly stating the accounting firm's understanding of the services to be provided. The letter must include the name(s) of the person(s) who will be authorized to make representations for the firm, their title(s) and contact information. The person signing the covering letter must be authorized to bind the Proponent.

Proposals must include the following items:

1. **Company Profile and Contact:** A brief profile of your firm indicating the scope of its practice and range of activities performed by the firm, such as auditing, tax accounting or management services. Identify the Proponent's contact person, along with contact information. State the contact information for the local office that will manage or assist in managing this audit.
2. **Experience with Municipal Audits:** List current and past public sector audit clients and indicate the number of years your firm has been the auditor for each client. Describe your familiarity and experience with PSAB accounting and auditing standards.
3. **Audit Staffing:** Provide the name and brief resume of the partner, manager and other key staff who would be assigned to this audit.
4. **Audit Implementation:** Proposals must clearly show the firm's understanding of the work to be performed, audit approach and commitment to perform the work within the time period specified in the annual schedule. This would include the approach to be used to gain an understanding of the City's structure and systems as well as a proposed schedule and any specific techniques or processes to be used for the interim audit and annual audit.

5. **Fee Proposal:**

Fiscal Year Ending December 31	2026	2027	2028
Total Maximum Fees	\$	\$	\$

The fee schedule shall include an all-inclusive maximum cost for the requested work for each of the three years. If the term is extended for an additional two years, fees for the extension will be negotiated at that time.

6. **References:** Include three references, at least two of which must be municipal audits within the last three years. Include number of years of service to and the name and contact information for each reference.

Submission of Proposals and Terms for Acceptance

Any change notices, appendices and addenda issued for this RFP will be available on the City's website www.cityofenderby.com and shall be considered part of this proposal document. It is the responsibility of the proponent to ensure all are downloaded, reviewed and included in their proposal.

Proposals are to be submitted in a sealed envelope clearly marked with the proposal name, on or before the closing date and time, to the attention of:

Attention: Jennifer Bellamy
Title: Chief Financial Officer
Address: 619 Cliff Ave (PO Box 400), Enderby BC, V0E 1V0
Telephone: (250) 838-7230
Email: jbellamy@cityofenderby.com

Proposals may be emailed to jbellamy@cityofenderby.com. The time and date will be determined by the timestamp noted in the email inbox.

Proposals will not be accepted after the closing date and time. Proponents may not modify their Proposals after the closing date and time.

All proposals must be received by no later than **3:00PM, WEDNESDAY September 2, 2026.**