

**Great Oaks Charter School  
REQUEST FOR PROPOSALS  
PROFESSIONAL SERVICES**

RFP Name: **Audit Services**

Submission Due Date/Time: **April 20, 2021 at 2PM**

**PROJECT INFORMATION**

This request for proposal (RFP) issued by Great Oaks Charter School is for the purpose of acquiring proposals from interested firms to provide auditing services.

**PROFESSIONAL SERVICES REQUIRED**

Certified Public Accountant (CPA) licensed to practice in the State of Delaware.

**PROJECT DESCRIPTION**

The firm must demonstrate knowledge, skills and abilities in the following areas:

- Meet independence standards of the American Institute of Certified Public Accountants (AICPA) and Government Auditing Standards
- Experience in independent financial and compliance audits of government entities
- Have available an adequate number of appropriately qualified staff and other resources to meet workload and delivery date requirements
- Audit engagement, planning and management
- Obtaining information from and about the auditee
- Understanding the auditee's system of internal controls
- Assessing control risk and developing the audit strategy
- Formulating the audit report and communicating findings
- Completion of the annual 990 form

**QUESTIONS**

Questions are to be submitted to [dburke@greatoakswilm.org](mailto:dburke@greatoakswilm.org) and to [karenthorpe28@gmail.com](mailto:karenthorpe28@gmail.com). In order to ensure a timely response, questions must be submitted at least 5 days prior to the proposal due date.

**PROPOSAL REQUIREMENTS**

1. Interested firms must submit the material required herein or they may not be considered for the audit services:
2. Proposals must be received prior to the Submission Due Date and Time.
3. Proposals are to be delivered to:

Great Oaks Charter School  
Attn: Damien Burke  
1200 North French Street  
Wilmington, DE 19801

And by email to:

[karenthorpe28@gmail.com](mailto:karenthorpe28@gmail.com)

4. Submit one (1) original and two (2) copies of the proposal to the listed address and email one electronic copy to the email address provided.
5. Proposals submitted should include the following sections listed below:
  - a. Letter of Interest that includes the following:
    - i. Understanding of the anticipated assignment, services required and approach to providing the services required.
    - ii. Include a description of the firm including location and size.
  - b. Organizational Chart
  - c. Resumes of key personnel
  - d. References

**RATING CRITERIA**

#	CRITERIA DESCRIPTION	WEIGHT
1	Availability of personnel	25%
2	Understanding of the assignment, services provided and approach to providing the services	25%
3	Experience conducting audits in Delaware charter schools	25%
4	Price	25%

**SCOPE OF SERVICES**

3 phases to the work:

- Compilation of Financial Statements (may engage a separate firm to complete the compilation)
- Audit work and issue Financial Statements with audit opinion
- Prepare and file 990 Form timely

**General**

Great Oaks Charter School is soliciting the services of qualified firms of certified public accountants to audit its financial statements for the fiscal years ending June 30, 2021, 2022 and 2023 with the option of two (2) one year extensions.

**Scope of Work to be Performed**

The auditor is to express an opinion on the fair presentation of its basic financial statements in conformity with generally accepted accounting principles.

A copy of the school’s audit for 2020 is attached for your review to understand the scope of work.

## Special Requirements

### Independence

The firm should provide an affirmative statement that it is independent of the school.

The firm should list and describe the firm's professional relationships involving the school.

### License to Practice in Delaware

The applicant must provide evidence of a valid Delaware business license.

The firm shall certify that it has not been suspended or disbarred from performing government audits or from other government activity.

## Proposal Price

The dollar cost proposal should contain all pricing information relative to performing the audit engagement as described in this proposal. The price of the proposal is to contain all direct and indirect costs including all out of pocket expenses.

## Time Requirements

Field work may begin in June

Fiscal reports for compilation are available July 15<sup>th</sup>

A draft audit must be available by September 10<sup>st</sup>

The final audit must be available for review by September 20<sup>th</sup>

990 tax return completed by October 31<sup>st</sup>

The school will provide to the audit firm Accounts Receivable, Accounts Payable, Deferred Payroll and Accrued Payroll schedules for audit.

Attachment 1 must be submitted with the RFP.

ATTACHMENT 1

CERTIFICATE OF NON-COLLUSION

By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief:

The prices in this bid have been arrived at independently without collusion, consultation, communication or agreement for the purpose of restricting to such prices, with any other bidder or with any other competitor.

Unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the Bidder and will not knowingly be disclosed by the Bidder prior to opening, directly or indirectly to any other bidder or to any other competitor; and

No attempt has been made or will be made by the Bidder to induce any other person, partnership or corporation to submit a bid for the purpose of restricting competition.

\_\_\_\_\_ Signature of Bidder or Offeror's Authorized Official

\_\_\_\_\_ Name and Title

\_\_\_\_\_ Date

Sworn and Subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 2021

\_\_\_\_\_ My commission expires: \_\_\_\_/\_\_\_\_/20\_\_\_\_

Notary Public