



The Stop Abuse in Families (SAiF) Society is a charitable organization with a mission to promote healthy respectful relationships through education, advocacy, & support. We offer services to those who have been impacted by family violence and abuse in the St. Albert, Sturgeon County, and surrounding rural communities.

## **Request for Proposal (RFP)**

### **Purpose**

The Stop Abuse in Families (SAiF) Society is seeking a designated accountant or accounting firm to complete SAIF's annual review engagement for the year ended December 31.

### **Vendor Requirements**

- The accountant or accounting firm is in good standing with a Chartered Professional Accountant (CPA) designation in Alberta (legacy designations Chartered Accountant (CA), Certified Management Accountant (CMA) and Certified General Accountant (CGA) are all acceptable).
- Business is primarily based in St. Albert and surrounding areas.
- To perform an audit for the year ended December 31, when requested by the Board of Directors of SAIF.

### **Background of SAIF**

The Stop Abuse in Families (SAiF) Society is a CRA registered charitable organization established in 1988 under the Alberta Societies Act to provide support and services to those impacted by family violence in the St Albert area. Over the last 3 decades, the Society has grown to encompass a number of programs that provide education, advocacy and counseling for those who have witnessed, experienced, and/or perpetrated family violence in St Albert, Sturgeon County & nearby rural communities. We are not a shelter but a 2<sup>nd</sup> stage trauma organization that maintains a multi year lease on offices based in St Albert.

For more information, please visit our website: [www.saifsociety.ca](http://www.saifsociety.ca)

### **Funding Sources**

Approximately 50% of our funding comes from donations, corporate sponsorships, community fundraising & foundations. The other half comes from year to year grants from various levels of government and an AGLC Casino. In the past few years, we have maintained an annual budget of just under \$500,000 in operating which is a good balance between meeting community needs and what we think we can sustainably raise on an annual basis. We do maintain some restricted funds to manage emergencies & critical infrastructure replacement. We also have a small endowment which we do not own but from which we derive annual disbursements and to which we contribute as and when we can.

### **Users of Financial Statements and Accounting Software**

Our financials are completed on SAGE 50 Premium, our financial statements are based on the accrual accounting method and our grants are often designated spending and therefore need to be deferred over a granting period. While our Board does review financial statements on a monthly basis (both an income sheet & balance statement), many of our funders request an annual review of our year end financial statements in order to qualify for funding and for various reporting on awarded grants.



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### **Important Dates**

- **Year- End:** December 31
- **Annual General Meeting (AGM):** Mid-May
- This is where the reviewed financial statements are presented to SAIF's membership and finalized.
- Draft financials to be delivered 3 weeks before April board meeting

### **Scope of Work**

- Deliver a set of reviewed financial statements in accordance with Canadian standards for not-for-profit organizations (ASNPO), including:
  - Statement of Financial Position as at year-end,
  - Statements of Revenues and Expenditures,
  - Change in Net Assets,
  - Cash Flows for the year then ended,
  - Summary of Significant Accounting Policies,
  - Notes to the Financial Statements, and
  - Independent Practitioner's Review Engagement Report
- Provide an Engagement Letter
- Accountant or accounting firm to present the draft financial statements at the AGM

### **Term**

1 year term from January to December, subject to renewal upon annual appointment by SAIF membership at the AGM

### **Vendor Selection Process**

- Selected vendors will be invited for an interview with the Executive Director and Members of the Finance & Risk Committee
- Finance & Risk Committee will provide vendor recommendations to the Board and the Board will select the vendor
- RFP for the accountant will be conducted regularly, based on the guidelines outlined in the Vendor Selection Policy
- Should an accountant or accounting firm be considered not in good standing with the governing body, CPA Alberta, the vendor will be terminated effective immediately.



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**Required Questions to Complete:**

1. Vendor Information:
  - a. Full Legal Name of Vendor
  - b. Street Address, including City, Postal Code
  - c. Primary Phone Number
  - d. Primary Respondent Contact Name, Title, Phone Number and Email
  - e. Company Website (if any)
2. Overview of the size of the company, # of employees, years in operations, types of clients you serve.
3. What is your accounting background and qualifications?
4. How does your company meet SAIF Objectives?
  - a. Are you a good-standing CPA?
  - b. Is your business primarily based in St Albert and surrounding areas?
  - c. Can you perform review engagements?
  - d. Can you perform audit engagements?
5. What is your expertise (i.e. # of years) in serving not-for-profit organizations?
6. Who on your team would work on this engagement, what are their qualifications and how many years of experience do they have?
7. What is the price for a review engagement for a not-for-profit organization under \$500k?
8. What is the price for an audit engagement for a not-for-profit organization under \$500k?
9. Description of why you should be selected as SAIF's reviewer of financial statements.
10. Vendor References: Please provide 2 relevant clients who are similar to SAIF in size or scope of work.
  - a. Full legal name of customer
  - b. How is the customer similar to SAIF?
  - c. How long have they been your client for?
  - d. Any additional comments you think we should know about?