



TOWNSHIP OF MCKELLAR  
REQUEST FOR PROPOSAL (RFP)  
FORENSIC AUDIT – DEC. 31, 2019 – DEC. 31, 2022  
RFP 2023-002

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# THE CORPORATION OF THE TOWNSHIP OF MCKELLAR



Invites

## REQUEST FOR PROPOSALS

### RFP NUMBER 2023-002

to conduct a forensic audit for fiscal year ending December 31, 2019,  
through fiscal year ending December 31, 2022

Sealed Proposals, clearly marked  
“Sealed Proposal – Forensic Audit – Do Not Open”  
will be received by the undersigned  
until 2:00 p.m.  
on March 3, 2023  
and opened at below address at 2:10 p.m. on said date

Lowest or any Proposal not necessarily accepted.

The Corporation of the Township of McKellar  
Administration Department  
P.O. Box 69, 701 Hwy 124  
McKellar, ON P0G 1C0  
[clerk@mckellar.ca](mailto:clerk@mckellar.ca) [deputyclerk@mckellar.ca](mailto:deputyclerk@mckellar.ca)  
(705) 389-2842



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**TOWNSHIP OF MCKELLAR  
REQUEST FOR PROPOSAL**

**I. INTRODUCTION**

Notice of Invitation – The Corporation of the Township of McKellar (hereafter referred to as “Township”) through this Request for Proposal (hereafter abbreviated as “RFP”) extends an invitation to qualified auditing firms to submit a proposal to conduct a forensic audit for fiscal year ending December 31, 2019, through fiscal year ending December 31, 2022.

There is no expressed or implied obligation for the Township to reimburse responding firms or any third parties for any expenses incurred in preparing proposals in response to this request.

Proposal Submission – Prospective firms should submit detailed Proposals on or before March 3, 2023 at 2:00 p.m. eastern time with opening of proposals at 2:10 p.m. on March 3, 2023. Faxed or e-mailed Proposals will not be accepted. Proposals should be mailed or hand delivered to:

Township of McKellar  
Attn: Clerk/Administrator, Ina Watkinson **or** Deputy Clerk, Karlee Britton  
P.O. Box 69  
701 Hwy. 124  
McKellar, ON P0G 1C0  
“FORENSIC AUDIT - SEALED PROPOSAL – DO NOT OPEN”

Proposal cover letters should designate who can answer questions concerning the submitted proposals. An officer empowered to bind the firm submitting the proposal must sign the proposal.

By responding to this RFP, the firm is agreeing to the terms, conditions and requirements set forth herein, unless expressly noted in writing.

1. **Proposal Format:** One original and five copies of each proposal should be submitted in the format outlined in Section V, “Proposal Format.”
2. **Questions:** Any questions should be submitted, prior to the closing deadline date of March 3, 2023 at 2:00 p.m. eastern time, to the Clerk Administrator, Ina Watkinson [clerk@mckellar.ca](mailto:clerk@mckellar.ca) (705) 389-2842 or to the Deputy Clerk, Karlee Britton [deputyclerk@mckellar.ca](mailto:deputyclerk@mckellar.ca). Questions received less than three (3) business days before the date and time of closing cannot be answered. All addenda issued during the time of bidding shall be incorporated into the final contract.



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This RFP is not to be construed as creating a contractual relationship between the Township and any firm submitting a response to this RFP. The Township shall incur no financial obligation or liability to any firm, solely based on the firm having responded to this RFP. All costs associated with preparation of a response to this RFP are to be borne solely by the respondent.

The RFP is not intended to create a public bidding process, and the Proposal with the lowest quoted fees will not necessarily be accepted, nor will any reason for the rejection of any proposal be indicated.

The Township reserves the right to privately negotiate with any firm.

The Township reserves the right to not accept any Proposal, to modify the scope with one or more of the respondents, and to waive any and all requirements which the Township deems to be in its best interest.

Firms submitting a proposal in response to this RFP may be required to give oral presentations to the Council of the Township of McKellar. The Township's request for an oral presentation shall in no way constitute acceptance of a proposal or imply that an agreement is pending. The Township reserves the right to award the opportunity to provide the services specified herein on initial proposal submissions without oral presentations.

Each Proposer is responsible for ensuring it gets the information it needs to make a responsible Proposal that allows it to execute the Contract if it is awarded the Contract.

Proposals must be held firm and cannot be withdrawn for thirty (30) calendar days after the opening date.

Services shall commence upon the issuance and reception of a Notice to Proceed ("NTP") letter and shall remain in effect until the Services acquired in conjunction with this Solicitation are completed, and the findings and any associated reports are accepted by the Township. The term shall not exceed one month.

Contract terms and conditions will be negotiated upon selection of the winning Proposer for this RFP. The successful Proposer shall be allowed ten (10) calendar days from the date of the Notice to Proceed ("NTP") letter to execute and return the Contract along with all required documents to the Designated Official.

- 3. Indemnification and Insurance:** Prior to the commencement of any work, the Proponent must furnish to the Township, at the Proponent's expense, valid and current certificate(s) of insurance satisfactory to the Township, as set out below. In the event that the certificate(s) of insurance is/are not satisfactory, the Township



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may require the Proponent to provide a certified copy of the policy which must remain valid for the duration of the contract.

All insurance policies of the Contractor shall be underwritten by an insurer licenced to conduct business in the Province of Ontario and shall include a waiver of subrogation against The Corporation of the Township of McKellar, its and their respective successors, assigns, elected officials, directors, agents and employees.

The certificate(s) for the coverage and amounts listed below are to be provided:

- \$2,000,000 – Commercial General Liability

The Commercial General Liability policy shall contain:

- A “Cross Liability” clause or endorsement;
- An endorsement certifying that the Corporation of the Township of McKellar is added as an additional insured;
- An endorsement to the effect that the policy or policies will not be altered, cancelled or allowed to lapse without thirty (30) days prior written notice to the Township;
- Non-owned automobile coverage with a limit of at least \$2,000,000 including contractual non-owned coverage;
- Products and complete operations coverage

**WSIB**

To the extent that the Workplace Safety and Insurance Act S.O 1997 c. 16, Schedule A, as amended, applies to the Deliverables, and whether a Contract refers to manufactured items or to work, the Supplier warrants and agrees that it has complied and will comply with applicable workplace safety and insurance laws and regulations if the work is performed on McKellar Township premises and further will comply with any and all other applicable laws and regulations if the work is performed on McKellar Township premises and further will comply with any and all other applicable laws, codes, regulations, rules and orders, including but not limited to all requirements of law governing occupational health and safety.

**ACCESSIBILITY FOR ONTARIANS WITH DISABILITIES ACT (AODA)**

Prior to the commencement of any work under this Contract, the Proponent shall furnish evidence of compliance with the requirements of the Accessibility for Ontarians with Disabilities Act, 2005.

The Proponent shall submit to the Township of McKellar, upon request, as required from time to time, documentation describing its training policies, practices and procedures, and a summary of the contents of training, together with a record of the dates on which training was provided and the individuals to whom training was



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provided. The Township of McKellar reserves the right to require the Proponent to amend its training policies, practices and procedures if the Township deems the same is not in compliance with the requirements of Regulation.

For further details, go to [www.AcessON.ca](http://www.AcessON.ca) and [www.mcass.gov.on.ca](http://www.mcass.gov.on.ca) (click on “Accessibility for Ontarians with Disabilities”)

- 4 Failure to Perform:** If, in the opinion of the Township, the successful respondent, hereafter referred to as “Contractor,” refuses to begin work, improperly performs said work, or neglects to follow generally acceptable professional standards, then Council may notify the Contractor to discontinue all work under the Contract. If, at any time, the Township believes said work is being unnecessarily delayed and will not be finished within the prescribed time, then Council may notify the Contractor to discontinue all work under the Contract.
- 5 Schedule of Deliverables:** A proposed schedule of deliverables and proposed percentage of payment with each item should be submitted as part of the Proposal. An itemized accounting of fees, in Canadian dollars, as well as a total guaranteed maximum fee for auditing the four financial years and preparing the proposed internal control findings and recommendations is requested.
- 6 Federal and Provincial Regulations:** The Contractor shall comply with all federal, provincial and local rules and regulations regarding forensic auditing services to be rendered.
- 7 Labour, Materials and Equipment** shall be supplied by the Contractor. Unless otherwise provided in this Solicitation, the Contractor shall furnish the following, including, but not limited to, all labour; material; equipment; adequate supervision; and coordination for satisfactory Contract performance.
- 8 Personnel:** The Contractor will be responsible for complying with all federal, provincial and local laws related to minimum wage, social security, non-discrimination, AODA, worker’s compensation.
- 9 Council Meetings:** The Contractor must be available to attend municipal Council meetings when required. The Contractor must be prepared to answer any questions and/or provide oral presentation(s), with accompanying handouts or power-point, if requested by Council and/or an authorized Township representative.
- 10 Fraud or Bribery:** Should the Contractor, any of his/her agents give or offer any gratuity to, or attempt to bribe any member of the awarding body, officer or servant of the Township of McKellar, or to commit fraud against the Township of McKellar, the Township shall be at liberty to declare the RFP void forthwith.



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## **II. NATURE OF SERVICES REQUESTED**

- 11. Scope of Work:** The purpose of this solicitation is to select a firm to provide a proposal for forensic auditing services related to all financial accounts of the Township of McKellar, including, but not limited to, contracting, requisition and purchase order processes, bank reconciliations, bid processes, purchasing, procurement, policies, procedures, and other financial activity. The period for review for these items should begin in fiscal year ending December 31, 2019, and continue through fiscal year ending December 31, 2022. Beyond this period, the Township is also requesting a review of existing controls and compliance with these controls along with identifying areas of risk of fraud and misconduct and recommending improvements and best practices. The engagement should be planned and carried out with sensitivity towards not overburdening Township Staff.

Any interpretation of or modification to the Proposal Documents will be made by Addendum in writing. Any Addendum will be posted on the Township's website and forwarded to each Proposer in writing. Each Proposer shall confirm prior to submitting its Proposal that it has received all Addenda. Questions received less than three (3) business days before the date and time of closing cannot be answered. All addenda issued during the time of bidding shall be incorporated into the final contract.

- 12. Audit Reports:** The final reports shall provide an evaluation of the Township's
- Internal accounting and operating controls
  - Review compliance with these controls
  - Evaluate risk of fraud and misconduct
  - Recommend enhancements where necessary to strengthen the Township's practices

and shall become the property of the Township of McKellar upon the completion of the Contract.

The Contractor shall conduct the engagement with care and due diligence in accordance with the relevant industry guidance. The audit reports shall develop the findings, conclusions and recommendations; and shall prepare the proposed enhancements to internal controls as recommended and the additional recommended practices and resources (personnel, equipment, etc.) necessary to implement, carry out and monitor these recommendations.

**Status of the Contractor:** The Contractor is engaged as an independent contractor for the sole purpose of performing the work described in the RFP and the Contract. Neither the Contractor nor any of its personnel is engaged as an employee, servant or agent of the Township of McKellar.



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- 13. Township Responsibilities:** The Township will make personnel available during regular work hours and schedules for inquiries from respective Township personnel, and make available accounting and other documents for review.
- 14. Findings and Observations:** The Contractor shall provide all findings and observations in both a verbal presentation and in its written reports. The Contractor may be required to attend Council meeting(s) to report the progress of the audit or to report significant findings, or to obtain authorization for any expansion of the scope of services, if required.
- 15. Time Frame:** The Township is expecting that said services shall be completed within a one (1) month time frame. The Respondent shall provide a time of completion with its proposal.
- 16. Instances of Fraud:** There has not been any instance of known fraud, but over the past four years the Township has experienced a relatively large turnover in personnel responsible for the finances of the Township.

### **III. EVALUATION/SELECTION PROCESS**

- 17. Minimum Qualifications:** To be eligible to respond to this Solicitation, the Proposer must demonstrate sufficient capacity, resources and experience to provide the intended auditing services, more fully described under Section II, Nature of Services Requested. The Proposer must provide at least three (3) references of clients to which it has provided said Services. If available, such references should be representatives of Ontario jurisdictions to which the Proposer is currently providing, or has provided, Services within the last three (3) years.

The team performing the audit should include a lead auditor possessing a CPA and 5 years of experience and at least one member that holds one of the following certifications and 5 years of experience in performing forensic audits: forensic advisory/investigator; certified data analysts.

The team that will be assigned responsibility for the forensic audit will list the most significant Contract services (maximum 5) performed in the last five years that are similar to the requested services described in this Request for Proposal. These past services should be ranked on the basis of total staff hours and indicate the scope of work, date, contract partners, total hours and the name and telephone number of the principal client contact.

The Proposer shall provide rates for additional services, if any, beyond the scope of these Proposal Documents.





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The Proposer shall disclose whether any of the services will be subcontracted and, if so, a description of how the Proposer selects the subcontractors and what the obligations are of the Proposer and the subcontractor(s) and the identity of the subcontractor(s).

- 18. Evaluation Process:** Township Staff shall review the responses to this Solicitation for compliance with the requirements and the Township Council shall provide an objective evaluation of all the Respondents.
- 19. Selection Criteria:** Selection Criteria. Evaluation of proposals and selection of a firm shall be at the sole discretion of the Township Council. Criteria will be scored on a scale of “0” to “100” per council member with the maximum number of points available for each criterion as noted below. The maximum number of points to be scored under this process is 100 points per council member. Scoring is based on a point total per council member and not a percentage. The highest-ranking Respondent will be determined by using a combination of Respondent’s total scores for criteria listed. Selection will not be based solely on lowest price. The Township will put each Proposal through a process of evaluation to determine the Respondent’s responsiveness to the Township’s needs. Criteria to be considered:

<b>CRITERIA</b>	<b>MAXIMUM POINTS</b>
Qualifications and Experience	30
Methodology & Approach (Work Management Plan)	20
Price Proposal	35
References	15
<b>Total Evaluation Score:</b>	<b>100</b>

The appointment of the successful consultant shall be in accordance with a selection process as outlined, with Council authorizing final selection as per the Township Procurement Policy. [By-law-2019-44.pdf \(mckellar.ca\)](https://www.mckellar.ca/By-law-2019-44.pdf)

The following selection process will apply:

- (i) Scrutiny of the bid submissions relative to compliance with the requirements of the RFP.
- (ii) Elimination of bids from proponents where the proponent, or its principals, have been, or are currently involved in litigation with the Township of McKellar other than a claim for property damages or personal injury, where that litigation impacts upon the ability of the parties to further engage in reasonable business relations.



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The selected Proponent will be required to sign a contractual agreement with the Township of McKellar which acknowledges that the Proponent has full knowledge of and agrees with the general specifications, conditions and requirements of the Request for Proposal. It is anticipated that the contract will be awarded in March, 2023.

The initial contract will extend from March 20<sup>th</sup> to April 21, 2023 or sooner completion date if Services are completed to the satisfaction of the Township.

The Township reserves the right to not award the contract to the lowest or to any proponent/bidder/applicant.

- 20. Oral Presentations:** Respondents may be invited to provide an oral presentation as a part of the evaluation process for this Solicitation. In this eventuality, Township Council will schedule interviews with selected Respondents only. Notice of assigned presentation times will be communicated in advance to the Respondent but may be given short notice of appearance. The purpose of the presentation will be to clarify the Response and ensure a mutual understanding of the scope of work. Verbal exchanges between the presenter(s) and Township Council during presentations are intended only for purposes of providing clarification in response to questions from Council.
- 21. Negotiations:** The Township may award a Contract based on initial offers received without discussion. Therefore, each initial offer should contain the Proposer's best terms from a monetary and technical standpoint.

Notwithstanding the foregoing, if the Township and said Proposer(s) cannot reach an agreement on a Contract, the Township reserves the right to terminate negotiations and may, at the Council's discretion, begin negotiations with the next lowest responsible and responsive Proposer. This process may continue until an Agreement acceptable to the Township has been executed or all proposals are rejected. No Proposer shall have any rights against the Township arising from such negotiations or termination thereof.

Any Proposer recommended for negotiations may be required to provide to the Township:

Information concerning any prior or pending litigation, either civil or criminal, involving a governmental agency or which may affect the performance of services to be rendered herein, in which the Proposer, any of its employees or Subcontractors is or has been involved within the last three (3) years.

**Acceptance of RFP Terms.** Once the proposal due date has passed, a proposal submitted in response to this RFP shall constitute a binding offer. A submission in response to this RFP acknowledges acceptance by the Qualified Contractor of all



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terms and conditions of participation in this procurement as set forth in this RFP. The Qualified Contractor, by signing the proposal letter, certifies that it accepts all of the terms and conditions of participation in this procurement as set forth in this RFP, in full, without reservations, limitations, assumptions, restrictions, caveats, or any other type of Qualification, except for those exceptions to the Agreement noted in writing and submitted within a Qualified Contractor's Proposal. Further, the cover letter to any issued addenda to this RFP must be signed and returned with the proposal.

**IV: REFERENCES**

**Client 1**

**Name:** \_\_\_\_\_ **Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Scope of Work:** \_\_\_\_\_

**Contract \$ Amount:** \_\_\_\_\_ **Term:** \_\_\_\_\_

**Client 2**

**Name:** \_\_\_\_\_ **Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Scope of Work:** \_\_\_\_\_

**Contract \$ Amount:** \_\_\_\_\_ **Term:** \_\_\_\_\_

**Client 3**

**Name:** \_\_\_\_\_ **Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Scope of Work:** \_\_\_\_\_

**Contract \$ Amount:** \_\_\_\_\_ **Term:** \_\_\_\_\_



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**V. PROPOSAL FORMAT**

**IT IS THE RESPONSIBILITY OF THE RESPONDENT TO ENSURE THAT THE PROPOSAL BEING SUBMITTED IS TIMELY, COMPLETE, INCLUSIVE OF ADDRESSING ALL THE REQUIREMENTS AND EVALUATION CRITERIA HEREIN.**

PLEASE READ THE ENTIRE SOLICITATION BEFORE SUBMITTING A PROPOSAL.

- 22. General Instructions:** Respondents should carefully follow the format and instructions outlined throughout this section, observing format requirements where indicated. All materials (except for plans and schematics, if any) are to be submitted on 8 1/2" X 11" papers, paginated and separated by tabs to identify each required section. Neatly typed and double sided with normal margins and spacing. All documents and information must be fully completed and signed as required.
- 23. Copies:** Submit an original Proposal, be sure to clearly mark "Original" as such. Five (5) complete copies of the original Proposal are requested. Each copy of the proposal will be distributed to the Township Council after Staff has reviewed the original proposal for compliance with this Solicitation. Township staff will provide each council member with information concerning this review.
- 24. Submission:** Proposals are to be submitted in a sealed envelope bearing the name of the Respondent company along with their address and title "FORENSIC AUDIT SEALED PROPOSAL – DO NOT OPEN" no later than the time and date specified on page 1 of this Solicitation.

PROPOSALS RECEIVED AFTER THIS TIME WILL NOT BE OPENED FOR CONSIDERATION AND NO TIME EXTENSIONS WILL BE PERMITTED. THEY WILL BE RETURNED TO THE PROPOSER UNOPENED.

- 25. Proposal Format:** The proposal must be in the following format. Failure to include responses to items #1 through #5 below may result in the Proposer being deemed non-responsive and resulting in the Proposal not being considered.

Each required Item below should be separated by a physical tab/divider to ensure all necessary documents are not overlooked.

**LABEL EACH SECTION AS NUMBERED**

- 1. Cover Page Form.** A cover page shall be submitted as part of the Solicitation. The cover page shall include the company name, the person authorized by law to render the services and his/her title. In addition, the Respondent shall include the mailing address,



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phone number, and e-mail address. The Respondent shall identify one person of authority who will receive all notifications and will be contacted directly by the Township as needed in reference to this Solicitation. (see Submission Form below)

2. **References.** Respondent must provide at least three (3) references of work within the last five (5) years, preferably from government agencies related to contracts of similar scope as described in this Solicitation. A contact name, phone number and e-mail address should be included for each reference. Experience will NOT be considered unless complete reference data is provided.
3. **Licensing/Certifications.** Provide copies of all licenses and/or certification requested for the Project/Services of the Solicitation.
4. **Qualifications & Experience.** The Respondent shall provide a narrative description (relevant experience, qualifications & past performance) of the company and the Service. Included as part of the narrative shall be the following information:
  - An explanation of why the Respondent is the best qualified to perform the Contract and demonstrate its qualifications including an item-by-item disclosure outlining how the firm meets or exceeds the requirements of this Solicitation.
  - A schedule of proposed services. The schedule should include the Respondent's understanding of the issues and tasks of the Work at hand.
  - The team performing the audit should include a lead auditor possessing a CPA and 5 years of experience and at least one member that holds appropriate certification and 5 years of experience in performing forensic audits.
  - An organization chart and résumés of Key Staff members and sub-contractors, if any, assigned to the Contract to meet the requirements of these Solicitation documents.
  - The résumé shall concentrate on the person's experience and qualifications as it relates to the requirements for the Service. Information on résumés shall contain comprehensive data that is easily verifiable.
5. **Methodology & Approach to the Services.** Proposer's approach methodology to providing the services requested in this Solicitation should address the following:
  - Suitability of the methodologies and approaches used in achieving tasks
  - Overall organization to completing the Work
  - Ability to meet desired timelines and deadlines



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- Detail of how many staff members will be in the field at any one time and the expected requirements on Township staff during regular business hours
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**SUBMISSION FORM**

Contractor/Firm: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Position: \_\_\_\_\_

**Description of Work:**

The contractor will be required to provide all materials and labour necessary to complete all work required to perform a forensic audit of the Corporation of the Township of McKellar's financial records for the year ending Dec. 31, 2019, to the year ending Dec. 31, 2022 inclusive.

**Location:** Corporation of the Township of McKellar, 701 Hwy 124, McKellar, ON P0G 1C0

Subtotal (incl. contingency) \$ \_\_\_\_\_ (CAD)

H.S.T. \$ \_\_\_\_\_

**TOTAL CONTRACT PRICE** \$ \_\_\_\_\_ (CAD)

**An Itemized Quotation Must Be Attached or Included in the Proposal Package**

The Contractor is required to provide the Township with proof of insurance in the amount of \$2,000,000, and is responsible for all issues relating to WSIB, insurance, etc. for their employees with relation to this contract.

By signing below, I acknowledge that I have read and understand this Request for Proposal 2023-002 and I agree to abide by the terms and conditions contained herein.

Authorized Signature: \_\_\_\_\_ (I have authority to bind the corporation)

Name: \_\_\_\_\_ (Please Print or Type)

Date: \_\_\_\_\_

Witness: \_\_\_\_\_

Date: \_\_\_\_\_

\*Note that this submission is not transferable and any alteration of the Company name entered hereon will be cause for considering the proposal irregular and subsequent rejection of the RFP.