City of Dundee
Request for Proposal
Audit Services for the city and urban renewal agency.

PURPOSE OF RFP: The City of Dundee Oregon, a Municipal Corporation, located in Yamhill County, solicits proposals from qualified Certified Public Accountants for annual audit services as required by ORS 297.425.

SCHEDULE OF EVENTS:
PROPOSAL SUBMISSION DEADLINE: Proposal must be received by 4:00 pm Friday, June 6, 2025.

TIMELINE:

RFP advertised:	May 7, 2025
Proposals Due to the city:	June 6, 2025, by 4:00 p.m.
Review of Proposals:	Week of June 9, 2025
Interviews (if necessary)	Week of June 19, 2025
Council Approval	July 1, 2025
Contract Approval	July 15, 2025

Audit will start as agreed upon in the contract between the chosen contractor and the city.

SCOPE OF SERVICES: The firm selected will provide annual audit services as required by ORS 297.425, OAR 16210-000 through 330, and other applicable statutes, and as specified in this RFP and contract.

MINIMUM QUALIFICATIONS OF OFFERORS: Respondents to the request shall provide at a minimum those items disclosed in Section II of this document.

CONTACT FOR COPY OF RFP:
Steve Dahl
City Administrator
City of Dundee
P.O. Box 220
630 SW 5th Street
Dundee, Oregon 97115
503-538-3922
steve.dahl@dundeecity.org

SUBMISSION OF PROPOSAL: One copy of your proposal, in a sealed envelope, must be delivered before 4:00 p.m. on June 6, 2025. Please include on the envelope: "PROPOSAL FOR AUDIT SERVICES FOR THE CITY OF DUNDEE, OREGON" or a copy can be sent to

steve.dahl@dundeecity.org and in the subject line state PROPOSAL FOR AUDIT SERVICES FOR THE CITY OF DUNDEE, OREGON".

REQUEST FOR PROPOSALS

The City of Dundee, Oregon invites proposals from qualified independent Certified Public Accounting firms for annual audit services as required by ORS 297.425, OAR 16210-000 through 330, and other applicable statutes.

The appointment will be for a minimum of three years beginning with the fiscal year ending June 30, 2025. The appointment of the independent auditor will be determined by the respondents' experience, services provided and the cost for such services.

The City's objective is to select the firm best qualified to:

1. Examine, audit, and express an opinion on the City's financial statements.
2. Provide management letter.
3. Provide technical assistance to City personnel on various accounting and reporting questions, including GASB pronouncements, GAAP updates and changes in federal and state laws affecting the city.

CITY BACKGROUND

The City of Dundee is a municipal corporation in Yamhill County Oregon, approximately thirty-five miles southwest of Portland, Oregon. The City provides a full range of municipal services either by staff or contracts, including water, parks and street maintenance, street lighting, planning and development and general administration.

The governance of the city is vested in the City Council. The Council is composed of six elected members, and a mayor. The City Administrator is appointed by the Council and is responsible for all city functions. The City Administrator maintains all financial records. The city employs fourteen people, four in city hall, five in the fire station and five in public works. The total budget for the City of Dundee is $12 million dollars and the city's urban renewal agency is approximately $4 million dollars.

AUDITING STANDARDS TO BE FOLLOWED

The firm selected will provide an examination of the financial records of the City, on a cash fund basis, in accordance with Generally Accepted Accounting Principles, and the Minimum Standards for Audits of Oregon Municipal Corporations. The City's Comprehensive Annual Financial Report (CAFR) is to be prepared by City staff with the assistance of auditing staff, in full compliance with the pronouncements of the Governmental Accounting Standards Board (GASB) and/or the Financial Accounting Standards Board (FASB) as appropriate.

The auditor's opinion will be directed toward the fairness of the presentation of the financial statements in accordance with GAAP. The auditor will also provide compliance reports as required by Federal and State laws.

SECTION I – SCOPE OF SERVICES

The scope of the audit should be planned to preclude the necessity of exceptions arising from scope limitations and should be sufficient to enable the auditor to issue management letters.

Meetings and Progress Reports:

1. Pre-audit conference(s) with City management and accounting staff will be held each year to discuss audit schedules, working paper requirements, and report deadlines, as well as the audit program. The firm will prepare a written list of information that it will need to perform its work and request that t city staff provide that information to the auditors.
2. Progress report meetings will be held with key audit firm personnel and City financial management staff at regular intervals mutually agreed upon.
3. Post audit conferences will be held with key audit firm personnel and City management at a mutually agreeable date.
4. Audit firm management will present the financial report and management letter to the Council at the completion of the audit.

Reports Required.
The following reports are expected at the completion of the audit:

1. Comprehensive Annual Financial Report (CAFR) of the City of Dundee, including Independent Auditor's Report and Audit Comments & Disclosures Required by State Regulations.
2. Management Letter per Financial Report
3. The engagement should include recommendations to management, prepared by the audit firm in letter format, which include any findings, observations, opinions, comments or recommendations relating to internal control, accounting systems, compliance with laws, rules and regulations, or any other matters that come to the attention of the auditor during the course of the examination. The recommendations will be discussed with appropriate City officials prior to publication.

SECTION II - PROPOSAL REQUIREMENTS

Mandatory Requirement The audit firm must be properly licensed for public practice as an independent auditor and qualified as a municipal auditor in the State of Oregon.

Proposal Information

Proposals

Proposals should describe the types of services available from the firm, the professionals who would provide them and the standard hourly fees to be charged for such services. Please respond to the items listed below:

1. Provide a detailed description of your audit approach and work product delivered on similar engagements including potential dates for onsite work.
2. Explain how you would propose to use City personnel to assist you during the audit and indicate the approximate time requirement.
3. Describe the procedures followed in the technical review of audit reports prior to their issuance by qualified personnel independent of the audit engagement personnel.
4. Describe your firm's experience or knowledge of GASB pronouncements, which will help the City's compliance with GASB requirements.
5. Identify the local office partners, manager and/or key staff members who would be assigned to the audit for the three-year period. Describe their roles and provide a brief description of their professional experience, including experience in governmental auditing. Specifically address the level of audit field staff, review staff and management continuity that the city may reasonably expect.
6. Describe your policies and practices regarding the provision of advice and recommendations concerning financial policies, practices, and internal controls.
7. Provide three current municipal auditing clients as references, comparable to the City of Dundee. Include a contact person at the client site. References must be willing to be contacted directly by City staff.
8. Submit one sample of a management report that you have recently issued covering an audit that has similar services and is comparative to the City.
9. Provide any other information that supports the scope of services to be provided as set forth in Section I.

Cost Evaluation

The evaluation of the proposed fees of all qualifying proposals will be based upon the responses to the two areas listed below. The selection committee will consider the overall cost and the proposed audit hours. These factors are important in evaluating the reasonableness of the fee and the respondents' understanding of the audit time requirements.

1. A detailed fixed fee schedule (including out-of-pocket expenses) for auditing services for each year of the three-year contract. Identify the estimated number of hours each audit firm employee is expected to spend annually on the engagement.
2. Provide your firm's billing rates for all applicable classifications of professional personnel, as the city may require additional billable services. Discuss the method used in charging for any special requests, reports or broadening of the scope of services.
3. Please identify what additional "first time through" hours and costs, if any, that may be required of your firm and the city staff.

SECTION III – EVALUATION OF PROPOSALS

Proposals will be evaluated based on the submission requirements listed above to determine which firm best meets the needs of the city. After meeting mandatory requirements listed above, proposals will be evaluated on the following factors:

Category	**Points**
• Quality and comprehensiveness of audit approach.	10
• Experience and knowledge with GASB reporting requirements.	10
• Qualifications and experience of the firm and the members assigned to the City's engagement.	15
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• Cost Proposal	35
• References and past experience. Audit services costs. At the discretion of the selection committee, finalists may be invited to an oral interview.	30
Total	100

SECTION IV – PROPOSAL SUBMISSION

You may ask questions about this RFP by calling the City Administrator as listed on page 1 of this RFP. Information provided to any proposer will be placed in e-mail format and forwarded to all proposers. To be considered, one copy of your proposal in a sealed envelope must be delivered or emailed by the due date and at the address listed on page 1 of this RFP. Proposals received after the specified time and date cannot be considered and will be returned unopened.

SAMPLE CITY CONTRACT TEMPLATE ATTACHED WITH RFP

(Insert)