



ESTACADA FIRE & RESCUE

445 SE Currin Street • PO Box 1385

Estacada OR 97023 Phone 503-630-7712

ESTACADA RURAL FIRE DISTRICT 69



REQUEST FOR PROPOSAL

CERTIFIED PUBLIC ACCOUNTANT(S) AUDITING SERVICES

Estacada Fire District

PO Box 1385

Estacada, OR 97023

(503) 630-7712



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PROPOSAL DUE DATE AND TIME: **Thursday, February 20, 2025, 5:00PM**

Estacada Rural Fire District #69

Request for Proposal (RFP)

Annual Auditing Services for Fiscal Years Ending June 30, 2025, 2026, and 2027

Contact Person: Nikki Meyer, Finance Manager

Contact Information: nmeyer@estacadafire.org (preferred) or (503)630-7712

1. Introduction

The Estacada Rural Fire District #69 (the "District") is soliciting proposals from qualified certified public accounting firms to perform annual audits of the District's financial statements for the fiscal years ending June 30, 2025, 2026, and 2027, with the option to extend for an addition three years. The audit must be conducted in accordance with generally accepted auditing standards (GAAS), Government Auditing Standards issued by the Comptroller General of the United States, and the provisions of the Oregon Revised Statutes (ORS) applicable to municipal corporations.

2. Background Information

The District is a municipal corporation in the State of Oregon providing fire protection and emergency medical services to Estacada, Oregon, a city in Clackamas County, approximately 30 miles southeast of Portland. Situated along the Clackamas River and adjacent to the Mount Hood National Forest. The District operates under an elected Board of Directors and has an annual operating budget of approximately

3. Scope of Services

The selected auditing firm will be expected to perform the following services:

a. Annual Financial Audit

- i. Audit the District's financial statements for each fiscal year ending June 30, 2025, 2026, and 2027. The audit must be conducted in accordance with GAAS, Government Auditing Standards, and applicable ORS provisions. Prepare an Independent Auditor's Report expressing an opinion on the fairness of the financial statements.



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- b. Review of Internal Controls
 - i. Evaluate the District's internal control systems and provide recommendations for improvements. Report any material weaknesses or significant deficiencies identified during the audit.
- c. Compliance Audit
 - i. Test compliance with applicable state and federal laws and regulations, including ORS Chapter 297 and Oregon Administrative Rules (OAR) Chapter 162. Prepare a report on compliance and on internal control over financial reporting based on the audit.
- d. Communication with Governance
 - i. Present audit findings and reports to the District's Board of Directors in a public meeting. Provide a management letter outlining any observations, recommendations, and management's responses.
- e. Availability for Consultation
 - i. Be available throughout the contract term to answer questions and provide guidance on accounting and financial matters.

4. Qualifications and Requirements

Firms submitting proposals must meet the following minimum qualifications:

- a. Licensing and Independence
 - i. Must be a licensed Certified Public Accounting (CPA) firm in the State of Oregon. Must meet the independence standards of the U.S. Government Accountability Office (GAO).
- b. Experience
 - i. Demonstrated experience auditing governmental entities, specifically fire districts or similar special districts in Oregon. Knowledge of applicable Oregon laws and regulations governing municipal corporations.
- c. Staff Qualifications
 - i. Assign an audit team with relevant governmental auditing experience. Provide resumes detailing the qualifications and experience of key personnel.
- d. References
 - i. Provide at least three references from similar engagements with Oregon governmental entities within the last five years.



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5. Proposal Requirements

Proposals must include the following information:

- a. Transmittal Letter
 - i. A signed letter expressing the firm's interest in providing auditing services to the District. A statement confirming the firm's understanding of the work to be performed and commitment to perform the work within the specified time period.
- b. Firm Profile
 - i. Overview of the firm's history, size, and areas of expertise. Description of the firm's experience with governmental audits, specifically fire districts or similar entities.
- c. Audit Approach and Methodology
 - i. Detailed description of the firm's approach to planning and conducting the audit. Proposed timeline for the audit process, including key milestones and deliverables. Explanation of how the firm will comply with all applicable auditing standards and regulations.
- d. Fee Proposal
 - i. A detailed fee schedule for each fiscal year audit, including Total all-inclusive maximum price for each year's audit. Hourly rates for staff levels and estimated hours. Any additional services and associated costs.
- e. References
 - i. List of at least three references, including contact information and a brief description of services provided.
- f. Legal and Compliance Information
 - i. Disclosure of any regulatory or disciplinary actions taken against the firm or its personnel in the last five years. Proof of professional liability insurance coverage.
- g. Additional Information
 - i. Any other information the firm deems relevant to the proposal.

6. Submission Instructions

Deadline: Proposals must be received by **5:00PM** on **February 20, 2025**. Submission Method: Email proposals in PDF format to nmeyer@estacadafire.org with the subject line "Proposal for Auditing Services."



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Hard Copy Submission:

Estacada Rural Fire District #69
Attn: Nikki Meyer, Finance Manager
PO Box 1385
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7. Inquiries

Questions regarding this RFP must be submitted in writing by **Thursday, February 6, 2025**, to nmeyer@estacadafire.org. Responses to all questions will be posted on the District's website by **Thursday, February 13, 2025**.

8. Evaluation and Selection Process

Proposals will be evaluated based on the following criteria:

- a. Experience and Qualifications (30 percent): Relevant experience with governmental audits. Qualifications of assigned personnel.
- b. Audit Approach (25 percent): Understanding of the scope of work. Proposed methodology and timeline.
- c. Fee Proposal (25 percent): Competitiveness and transparency of the fee structure.
- d. References (10 percent): Feedback from provided references.
- e. Compliance with RFP Requirements (10 percent): Completeness and clarity of the proposal. Compliance with submission instructions.

9. Tentative Timeline

RFP Issued: January 7, 2025

Deadline for Questions: February 6, 2025

Responses to Questions Posted: February 13, 2025

Proposal Submission Deadline: February 20, 2025

Evaluation of Proposals: February 24, 2025

Notice of Intent: March 3, 2025

Contract Execution: March 18, 2025



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10. Contract Terms and Conditions

Term of Contract: The contract term will cover auditing services for the fiscal years ending June 30, 2025, 2026, and 2027, with the option to renew for additional years upon mutual agreement. **Termination:** The District reserves the right to terminate the contract at any time with 90 days' written notice. **Insurance Requirements:** The selected firm must provide proof of professional liability insurance, general liability insurance, and workers' compensation coverage as required by Oregon law. **Compliance with Laws:** The firm must comply with all applicable federal, state, and local laws and regulations, including non-discrimination and equal employment opportunity laws.

11. Public Disclosure

All proposals submitted become the property of the District and are subject to public records laws under ORS 192.311 to 192.478. Proprietary information must be clearly marked, but the District cannot guarantee confidentiality.

12. Protest Procedures

Any proposer who wishes to protest the intent to award a contract must submit the protest in writing within 10 calendar days after the notice of intent to award is issued. The protest must comply with the requirements set forth in ORS 279B.410 and ORS 279B.415.

13. Additional Terms

Non-Collusion: By submitting a proposal, the proposer certifies that the proposal is made without collusion with any other person or entity submitting a proposal. **Cost of Proposal Preparation:** The District is not responsible for any costs incurred by proposers in preparing or submitting proposals.

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