

Town of McClellanville
REQUEST FOR PROPOSALS
FINANCIAL AUDIT SERVICES

The Town of McClellanville is soliciting sealed proposals from qualified vendors for audit services for fiscal years ending June 2026, 2027, and 2028. **Sealed proposals are due by** noon on Friday, February 20, 2026. Sealed proposals should be hand carried or delivered by traceable means to Town of McClellanville, Town Administrator, 405 Pinckney Street, McClellanville, SC 29458. All proposals should be clearly marked **“RFP Auditing Services”**.

The proposal evaluation process will be completed within thirty days of receipt of proposals, and the prospective provider of this service will be identified. The pricing data reflected in your proposal must be valid through June 30, 2026.

All offerors may submit questions or requests for clarification in writing no later than noon, February 6, 2026. After that date, no more questions or requests will be accepted.

The Town reserves the right to accept or reject any or all proposals received as a result of this request for proposals or to negotiate with all qualified offerors, or to cancel, in part or in its entirety, this request for proposals if it is in the Town’s best interest to do so.

This solicitation does not commit the Town to award a contract or to pay for any costs incurred in the preparation of your proposal or to procure or contract for any goods or services.

Your proposal must be signed by an official of your company authorized to commit to and enter into a formal contract for goods and services.

The Town does not discriminate on the basis of race, color, national origin, sex, religion, age or disability in employment or in the provision of goods and services.

TOWN OF McCLELLANVILLE
REQUEST FOR PROPOSAL
Auditing Services

Fiscal Years:

2025 - 2026
2026 - 2027
2027 - 2028

I GENERAL INFORMATION

1. Proposals will be considered as specified herein or attached hereto under the terms and conditions of this proposal.
2. Proposals must be made in the official name of the firm or individual under which business is conducted (showing official business address) and must be executed in ink by a person duly authorized to legally bind the person, partnership, company or corporation submitting the proposal.
3. Offerors are to include all applicable requested information. Information submitted should be sufficient in detail to substantiate that services offered meet or exceed the specifications.
4. Six (6) complete copies of the Offeror's proposal response are required for evaluation.
5. Proposals will be received by the Town of McClellanville until noon on Friday, February 20, 2026.

II CONTRACT REQUIREMENTS:

1. **S.C. LAW CLAUSE:** Upon award of a contract under this proposal, the successful Offeror to whom the award is made must comply with the laws of South Carolina which require such Offeror to be authorized and/or licensed to do business in this State. Notwithstanding the fact that applicable statutes may exempt or exclude the successful Offeror from requirements that it be authorized and/or licensed to do business in this State, by submission of this signed proposal, the Offeror agrees to subject itself to the jurisdiction and process of the courts of the State of South Carolina as to all matters and disputes arising or to arise under the contract and the disputes arising or to arise under the contract and the performance thereof, including any questions as to the liability for taxes, license, or fees levied by the State.
2. **OFFEROR'S OUALIFICATIONS:** Offeror must, upon request of the Town, furnish satisfactory evidence of ability to furnish services in accordance with the terms and conditions of this proposal. The Town of McClellanville reserves the

- right to make the final determination as to the Offeror's ability to provide the services requested herein before entering into any contract.
3. **OFFEROR RESPONSIBILITY:** Each Offeror shall fully acquaint himself with conditions relating to the scope and restrictions attendant to the execution of the work under the conditions of this proposal. The failure or omission of an Offeror to acquaint himself with existing conditions shall in no way relieve him of any obligations with respect to this proposal or to the contract.
 4. **AFFIRMATIVE ACTION:** The Offeror will take affirmative action in complying with all Federal and State requirements concerning fair employment and employment of the handicapped, and concerning the treatment of all employees, without regard or discrimination by reason of race, color, religion, sex, national origin, or physical handicap.
 5. **TERMINATION:** Subject to the provisions below, any contract resulting from this proposal may be terminated by the Town providing a thirty-day advance notice in writing to the Offeror.
 - (a) Non-Appropriations: In the event sufficient appropriations are not made to pay the charges under the contract it shall terminate without obligation to the Town.
 - (b) Cause: Termination by the Town for cause, defaults or negligence on the part of the Offeror shall be excluded from the foregoing thirty-day notice provisions.
 - (c) Default: In case of default, the Town of McClellanville reserves the right to purchase any or all items/services in default in the open market, charging Offeror with any excessive costs. SHOULD SUCH CHARGE BE ASSESSED, NO SUBSEQUENT BIDS OF THE DEFAULTING OFFEROR WILL BE CONSIDERED UNTIL THE ASSESSED CHARGE HAS BEEN SATISFIED.
 6. **OFFEROR RESPONSIBILITIES:** The Offeror will be required to assume sole responsibility for the complete effort as required by this Request for Proposal (RFP). The Town of McClellanville will consider the Offeror to be the sole point of contact with regard to contractual matters.
 7. **OWNERSHIP OF MATERIAL:** Ownership of all data, material and documentation originated and prepared for the Town of McClellanville pursuant to this contract shall belong exclusively to the Town of McClellanville.
 8. **SUBCONTRACTING:** No part of the work shall be subcontracted without the prior written approval of the Town.

9. EXTENSION: At the election of the Town and provided the Town and Offeror agree to the compensation therefore prior to the end of the fiscal year ending June 30, 2028, the Town may extend any contract resulting from this proposal through the fiscal year ending June 30, 2029.

III SPECIAL INSTRUCTIONS:

1. **RECEIPT OF PROPOSAL:** The Town of McClellanville requires that six (6) copies of the proposal be submitted no later than the due date and time specified in the proposal. Offerors mailing proposals should allow a sufficient mail delivery period to ensure timely receipt of their proposals by the Town. Any proposals received after the scheduled closing date and time may be immediately disqualified.

Proposals are to be mailed to: Town of McClellanville
405 Pinckney Street
McCllellanville, SC 29458

Hand carry to: Town of McClellanville
Town Hall
405 Pinckney Street
McClellanville, SC 29458

- ## **2. PREPARATION OF PROPOSAL:**

- (a) All proposals should be complete and carefully worded and must convey all of the information requested by the Town. If significant errors are found in the Offeror's proposal, or if the proposal fails to conform to the essential requirements of the RFP, the Town will judge as to whether the variance is significant enough to reject the proposal.
 - (b) Proposals should be prepared simply and economically, providing a straightforward, concise description of the Offeror's capabilities to satisfy the requirement of the RFP. Emphasis should be on completeness and clarity of content.
 - (c) The Offeror must bear all costs associated with the preparation of the proposal and of any oral presentation requested by the Town.

3. **AMENDMENTS:** If it becomes necessary to revise any part of the RFP, an amendment will be provided to all Offerors who received the original Request for Proposal.

4. **INFORMATION:** Any explanation desired by an Offeror regarding the meanings or interpretation of the proposal schedule, attachments, specifications, etc. must be requested in writing and with sufficient time allowed for a reply to reach Offerors before the submission of their offer. All written requests should be directed to the attention of:

Michelle McClellan
Town Administrator
Town of McClellanville
405 Pinckney Street
McClellanville, SC 29458

Oral explanation of instruction given before the award of the contract will not be binding. Any information given to a prospective Offeror concerning the proposal schedule will be furnished to all prospective Offerors as an amendment to the Invitation for Proposal, if such information is necessary to Offerors in submitting offers or if the lack of such information would be prejudicial to uninformed Offerors.

5. **ORAL PRESENTATION:** Offerors may be required to make an oral presentation of their proposal to the Town after the proposal opening. Such presentations provide an opportunity for the Offerors to clarify their proposals and to ensure their contents by thorough, mutual understanding. If determined necessary, the Town will schedule the time and location for these presentations.
6. **AWARD:** Award shall be made to the responsive and responsible Offeror whose proposal is determined to be the most advantageous to the Town taking into consideration the evaluation factors set forth herein. In all cases the Town of McClellanville reserves the right to: 1) waive any informalities or irregularities in the proposals; 2) reject any or all proposals and to award or refrain from awarding the proposal to any Offeror; and 3) accept the proposal that is in the best interest of the Town. The Mayor and Town Council for the Town of McClellanville will make the final decision.
7. **PUBLIC ACCESS TO PROCUREMENT INFORMATION:** Proposals shall be publicly opened on Friday, February 20, 2026, at noon. Town Council will award the proposal at its meeting scheduled for 7:00 PM on March 2, 2026.

IV SCOPE:

The purpose of this document is to solicit proposals from independent certified public accountants and accounting firms, licensed in the State of South Carolina to perform financial and compliance audits for General Government Finance Division of the Town of McClellanville, covering the fiscal years ending June 30, 2026, 2027 and 2028.

1. The financial audits shall be made in accordance with generally accepted auditing standards promulgated by the American Institute of Certified Public Accountants, the Federal Single Audit Act, and the laws of the State of South Carolina.
2. Six (6) copies of the following reports are expected at the completion of each audit:

- (a) A report on examination of the financial statements of the Town of McClellanville including all accounts and funds. The financial statements and the notes to the financial statements shall be prepared by the auditor.
 - (b) A report on internal control and compliance in accordance with the Federal Single Audit Act.
 - (c) A report of comments and recommendations letter to management.
3. The Town of McClellanville shall close its books no later than the 15th of July of each year. During the audits, the auditor may be required to meet with Town Officials to discuss the progress of the audit or related matters.
 4. A conference with the Administrator and Treasurer to review the financial statements, compliance reports, and a draft of the report of comments and recommendations will be held no later than the last week of September of each year, with the final draft being available to Town Council by October's regularly scheduled Council meeting (held on the first Monday of the month).
 5. During the term of the contract, the selected Offeror shall be required, from time-to-time, to provide an official opinion or recommendation as it relates to financial matters of the Town of McClellanville. Such requirements which exceed the normal scope of the required annual audits shall be reimbursed on a per job basis. Submitted proposals shall include a minimum fee on a per job basis to be charged in such instances. It shall be understood that prior to commencing any such job, a fixed price shall be negotiated and agreed upon by both parties. Any changes from the originally agreed job price must be placed in the form of a change order and must exhibit that unforeseen circumstances have arisen as originally proposed.
 6. Upon award of the contract the selected auditor shall submit an engagement letter to include confirmation of the accepted proposal cost to be returned with a signed copy of the attached Audit Contract no later than May 31, 2026. If the selected Offeror is unable to fulfill obligations, a letter of termination of contract must be submitted by April 15th of the fiscal year for which the audit was to be conducted.
 7. The Town of McClellanville reserves the right to renegotiate the audit fee for any year in which the audit requirements of any Government agency substantially change.
 8. The Town of McClellanville's financial statements have been audited for many years and the Town's records have been found to be kept in good order. Offerors should base their quotes on the assumption that the Town's accounting system will minimize their difficulties in producing audit reports in an expeditious manner.

V. AWARD CRITERIA:

The evaluation of proposals will be conducted by the Mayor and Council and will be based on evaluation of criteria listed below, under the terms and conditions of the proposal. All Offerors must provide, at a minimum, the information listed herein, and the proposal submitted must reflect in detail the inclusion of these services as well as the degree of expertise in utilizing these capabilities.

<u>RANK</u>	<u>PRIORITY</u>
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1. Total Fees for the Audits.

The Total Fee for Audits should be submitted on the attached Proposal Form with an attached schedule of hourly rates for staff assigned to the project, partner in charge, printing or other out-of-pocket expenses, to include all miscellaneous items.

2. Qualifications of the Offeror and staff to be assigned to audit.

- (a) Description of Offeror's organizational structure and size.
- (b) Qualifications/Resumes of personnel to be responsible for audit.
- (c) Qualification/Resumes of persons responsible for field work.
- (d) Control and Review of staff.
- (e) An affirmation that the Offeror is properly licensed for public practice as a Certified Public Accountant.
- (f) An affirmation that the Offeror meets the independent requirements of the standards for Audit of Governmental Organizations, Programs, Activities and Functions.
- (g) List of other pertinent services provided by Offeror, which Offeror feels has enhanced the quality of an his accounting system.

3. Previous Experience/References:

To include a list of prior State, County, or Local government agencies where audits have been conducted, to include name, address, telephone number, and contact person. (State the number of years you have had a contract with the agency).

4. Examples of Completed Audits:

Offeror shall submit copies of previous comprehensive annual financial reports of at least three (3) separate entities in which Offeror conducted and formatted the required audit procedures necessary to produce such reports.

In addition to the information to be provided above, Offerors shall submit justifications as to the recommended staffing of the audit. Also, Offerors shall submit a statement of their understanding of the work, descriptions of the audit approach, illustrations of the procedures to be employed and the approximate date the audit will begin (including preliminary field work). Offerors which fail to include this information in their proposals shall be considered as non-responsive, and shall thus be disqualified.