



RFP # HV-946-09042026

REQUEST FOR PROPOSALS

FOR

FINANCIAL AND COMPLIANCE AUDITING SERVICES



PROPOSAL SUMMARY

Commodity/Service Being Requested: Financial and Compliance Auditing Services

Type of Solicitation: Request for Proposals (RFP) - Huron Valley Schools, in partnership with the CoPro+ cooperative purchasing program managed by the Public Procurement Institute of Michigan (PPIM), a nonprofit organization, is requesting proposals from firms qualified to provide professional financial and compliance auditing services.

Type of Resulting Contract: Statewide Cooperative Contract - As a result of this RFP, Huron Valley Schools will work with the CoPro+ cooperative purchasing program to market and extend the resulting Contract(s) to other government municipalities and school districts statewide.

Resulting Contract Term: Three (3) years with two (2) one-year renewal options.

TIMETABLE	
Release of RFP:	October 6, 2026
Proposer Questions Due by 12:00 PM Eastern Time:	October 19, 2026
Answers to Questions Posted:	October 26, 2026
Proposals Due by (12:00 PM Eastern Time) *:	November 6, 2026
Master Agreement Award Date:	December 2026

***Responses received later than the specified deadline will be disqualified.**

Contacts with Huron Valley Schools Personnel: All contact with Huron Valley Schools regarding this RFP or any matter relating thereto must be sent to the following email: clayton.thompson@ppim.org

Contents

SECTION 1.0 – PROPOSER RESPONSES TO SCOPE OF WORK AND PRICING	4
1.1 Minimum Mandatory Requirements	4
1.2 Scope of Work and Requirements	5
1.3 General Service and Contract Requirements.....	7
1.4 Service Specifications	8
1.5 Service Capabilities.....	10
1.6 Customer Service	10
1.7 Service Authorization and Cooperative Use.....	10
1.8 Deliverables and Acceptance.....	11
1.9 Pricing Schedule	12
1.10 Price Assurance	12
SECTION 2.0 – PROPOSER INFORMATION AND ACCEPTANCE	14
2.1 Company Profile.....	18
2.2 References	18
2.3 Assurances and Certifications.....	20
2.4 Disclosure Statement - Familial Relationship.....	21
2.5 Non-Collusion Affidavit.....	22
SECTION 3.0 – PROPOSAL, EVALUATION, SELECTION & AWARD PROCESS.....	22
3.1 Huron Valley Schools Responsibility.....	22
3.2 Truth and Accuracy of Representations	22
3.3 Proposer Questions.....	22
3.4 Preparation of the Proposal.....	23
3.5 Proposal Submission Deadline	23
3.6 Adherence to Mandatory Requirements (Pass/Fail).....	23
3.7 Evaluation Process	24
3.8 Evaluation Criteria	24
3.9 Optional Tools to Enhance Evaluation Process	24
3.10 Huron Valley Schools Option to Reject Proposals	25
3.11 Freedom of Information Act.....	25
3.12 Contacts with Huron Valley Schools Personnel	25
3.13 Final Agreement Award Determination	26
Attachment A – Pricing	27
APPENDIX A – Vendor Questionnaire	28
APPENDIX B – Regional Services Map	30

Solicitation Terms and Conditions – HVS/CoPro+ Master Agreement Template: [Business Office | \(hvs.org\)](https://www.hvs.org/BusinessOffice)

SECTION 1.0 – SCOPE OF WORK

Proposer Responses

Proposers must respond to all elements outlined in this RFP, using the provided “Proposer Response” text boxes where provided (see example below). There is no minimum or limitation on the number of words used for responses.

-EXAMPLE- Proposer Response:

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-OR-

Proposer Response:

☐	I have reviewed the above requirement(s) and agree with no exceptions.
☐	I have reviewed the above requirement(s) and have noted all exception(s) below.
List all exceptions:	

1.1 Minimum Mandatory Requirements

All proposals will be reviewed for compliance with the following minimum mandatory requirements. A proposal that does not satisfy these requirements may be deemed non-responsive and eliminated from further consideration.

1. The Proposer is properly licensed to practice public accounting in the State of Michigan and will maintain all required licenses throughout the Contract term.
2. The Proposer shall affirm its independence with respect to Huron Valley Schools in accordance with applicable AICPA professional standards and Government Auditing Standards issued by the U.S. Government Accountability Office. The Proposer shall disclose any current or prior services, relationships, or other circumstances that may affect or appear to affect its independence.
3. Engagement personnel who are subject to Government Auditing Standards continuing professional education requirements shall remain compliant with those requirements.
4. The Proposer shall submit its most recent external peer review report and any related letter of comments or acceptance. The Proposer shall disclose any unresolved corrective action, material deficiency, or professional disciplinary action that may affect its ability to perform the engagement.
5. The Proposer shall comply with the proposal preparation and submission requirements and accept the terms and conditions of this RFP, except for any exceptions expressly identified in its proposal.
6. The Proposer shall provide the references required by Section 2.2.

Proposer Response:

☐	I have reviewed the above requirement(s) and agree with no exceptions.
☐	I have reviewed the above requirement(s) and have noted all exception(s) below.
List all exceptions:	

1.2 Scope of Work and Requirements

1.2.1 Audit Schedule

Huron Valley Schools is requesting professional financial and compliance auditing services beginning the fiscal year ending June 30, 2027.

An audit schedule must be established with Huron Valley no later than May 1st of each year.

- A. Preliminary Audit fieldwork to commence before June 30th each year. Final Audit fieldwork commences approximately September 5th each year, or any time thereafter.
- B. Majority of Audit fieldwork to be complete by approximately September 20th each year. Auditors must deliver documents to meet audit deadlines of the Michigan Department of Education.

Pricing must be provided separately for each Contract year. The hourly rates and total annual project cost proposed for each year must remain firm throughout that Contract year. Any changes in pricing between Contract years must be expressly identified in **Attachment A – Pricing**.

1.2.1 Proposer Response:

☐	I have reviewed the above requirement(s) and agree with no exceptions.
☐	I have reviewed the above requirement(s) and have noted all exception(s) below.
List all exceptions:	

1.2.2 Firm/Auditor Qualifications

- A. The firm must maintain a sufficient number of professional staff in order to provide adequate technical expertise and supervision.
- B. The firm and the partner assigned to the District must have a minimum of five (5) years of experience auditing K–12 public school districts and Intermediate School Districts within the State of Michigan, including experience auditing an Annual Comprehensive Financial Report (ACFR) prepared in accordance with applicable accounting and financial reporting standards that comply with [Generally Accepted Governmental Auditing Standards](#).
- C. The auditor is expected to be familiar with the types of policies and procedures school districts follow.
- D. All staff must be properly trained and supervised.
- E. The firm must be able to demonstrate expertise in non-audit fields such as Federal and State Tax, business and organizational consulting, etc.
- F. The firm must have an excellent reputation for service in school district auditing.

1.2.2 Proposer Response: Please state whether you agree or explain exceptions.

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1.2.3 Audit Specifications

- A. Completion of an annual financial audit in accordance with generally accepted auditing standards and Government Auditing Standards (GAGAS/Yellow Book) issued by the U.S. Government Accountability Office, together with applicable requirements of the Michigan Department of Education and Michigan Department of Treasury.
- B. The financial report must be prepared in accordance with Governmental Accounting Standards Board ([GASB](#)) and the Michigan Public School Accounting Manual.
- C. Completion of a Single Audit, when required, in accordance with 2 CFR Part 200, the applicable Office of Management and Budget Compliance Supplement, Government Auditing Standards, and the Michigan School Auditing Manual.
- D. Financial and compliance audit in accordance with the requirements of the applicable sections of the [Revised School Code](#) and the Revised Bulletin for School District Audits of Bonded Construction Funds in Michigan.
- E. Completion of the [Required Audit Disclosures report/Management Letter](#) as required by the Michigan Department of Education (MDE).
- F. Electronic filing of the annual comprehensive financial report, single audit report, and required audit disclosures report/management letter with MDE.
- G. The auditor must attend and present the audit results in person at two (2) meetings each year following completion of the annual audit: (1) one Finance & Operations Board Committee meeting; and (2) one Board of Education meeting.
- H. All audit procedures must comply with applicable Michigan Department of Education and Michigan Department of Treasury requirements, AICPA professional standards, and Government Auditing Standards issued by the U.S. Government Accountability Office.

1.2.3 Proposer Response: Please state whether you agree or explain exceptions.

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1.2.4 Audit Timeline

- A. Preliminary Audit fieldwork (Internal Control Review) to commence at such time as mutually agreed upon.
- B. Final Audit fieldwork to commence in September of each year at such time as mutually agreed upon.
- C. Audit documents are to be delivered to the District each year to meet audit deadlines set by the state and federal government.

1.2.4 Proposer Response: Please state whether you agree or explain exceptions.

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1.2.5 District Information

- A. For information regarding the district, its funds, revenue, expenditures, and other relevant information, you can review the district's [Annual Financial Report and Federal Awards Report](#) available online under the District transparency page.

1.3 General Service and Contract Requirements

1.3.1 Reservation of Rights

Huron Valley Schools will evaluate the merits of all proposals submitted and reserves the right, in its sole and absolute discretion, to accept or reject, in whole or in part, any or all proposals or portions of proposals with or without cause. Huron Valley Schools further reserves the right to waive any irregularity or informality in the RFP process or any proposal, and the right to award one or multiple vendors. Huron Valley Schools reserves the right to add or delete services from the proposal, extend agreements, or change vendors, in order to best serve the eligible agencies. These changes will follow approved bidding laws. Huron Valley Schools may use the service cost, or the sum of groups of services, and/or total cost of ownership, to evaluate prices and award proposals. Huron Valley Schools reserves the right to request additional information from any or all Proposers. Huron Valley Schools also reserves the right to select one or more vendors to award a Contract to under this RFP. In the event a proposal is accepted by Huron Valley Schools, and the vendor asserts exceptions, special considerations, or conditions after acceptance, Huron Valley Schools, in its sole and absolute discretion, reserves the right to reject the proposal and award to other Proposer(s).

1.3.1 Proposer Response:

☐	I have reviewed the above requirement(s) and agree with no exceptions.
☐	I have reviewed the above requirement(s) and have noted all exception(s) below.
List all exceptions:	

1.4 Service Specifications

All services shall conform to the requirements and specifications of the applicable ordering entity and shall be subject to review and acceptance by that entity. The ordering entity may require the Contractor to correct incomplete, inaccurate, or nonconforming services or deliverables at no additional cost.

1.4 Proposer Response:

☐	I have reviewed the above requirement(s) and agree with no exceptions.
☐	I have reviewed the above requirement(s) and have noted all exception(s) below.
List all exceptions:	

1.4.1 Contractor Code of Conduct

The purpose of Huron Valley Schools and its employees is to provide a safe, positive learning environment for the students of the District. In providing that environment it is mandatory that all employees, visitors, and Contractors follow certain levels of conduct, dress, and demeanor. This Code of Conduct outlines the expectations of the Huron Valley Schools for persons both contemplating performing work and performing work for Huron Valley Schools in the capacity of

a Contractor or subcontractor. These rules will become part of the mandatory working conditions of the Contract and failure to comply by any Contractor, subcontractor, management, employee, or contracted consultant may result in the cancellation of the Contract. In general, it is expected that everyone entering a Huron Valley Schools facility, whether a school, support facility, or the surrounding grounds, must dress, act, and talk in a manner that is conducive to the education process of children while assuring their overall safety and security. The following rules have been established to ensure that this is done:

Every Contractor employee who enters or leaves the building must sign in and out at either the school office or the building engineer's office as designated by the school administrator. This sign-in sheet must record the name, time in and out, the firm, and the signature of the individual.

All Contractors shall be furnished by their company with a badge or identification that is to be worn while in the building. Such identification must clearly indicate the individual's name and the name of the firm they are working for.

Prior to the beginning of a job, the Contractor shall furnish the building engineer with a list of individuals expected to be on the job, contact persons with phone numbers, and a schedule of the activities to take place.

The Contractor shall provide the building engineer with a scope of work and check with him prior to drilling or penetrating any walls, floors, or ceilings.

Each person working in a school building or on school property shall comply with the following:

No drinking or possession of liquor or alcoholic beverages and/or possession of any kind of illicit drugs or narcotics.

No use of District facilities or equipment, including telephone, computers, internet access, fax, kitchen, maintenance, or office equipment.

No smoking or use of any tobacco products anywhere within the building at any time nor outside the school on District property during normal school hours (This is a law and punishable as a civil infraction by local authorities).

A reasonable standard of dress must be followed. Within the educational facilities where students and parents are or can be present, this means clothing or attire must be suitable for the work and must not bear images or writing depicting anything to be construed as obscene in nature or promoting or portraying alcoholic beverages or use, drugs, narcotics, tobacco, or establishments that serve or promote the use of these substances.

There shall be no use of profanity or obscene language or gestures. Language, gestures, or other actions that depict sexual or ethnic harassment or intimidation will not be permitted.

The Contractor is responsible for a clean and safe workplace. To that end, the following will be adhered to:

All work areas, walkways, and stairs must be kept clear of debris and loosely scattered materials.

Material storage is to be in an area designated by the Building Engineer.

All work areas are to be cleaned by the Contractor prior to leaving. Building staff will not be responsible for cleaning work areas.

All trash, debris, and material must be removed from the worksite each day and disposed of off-site. District dumpsters and trash containers are not to be used by Contractors for disposal.

All Contractor tools and equipment must be kept in good working order, with guards and safety devices in place and working. Defective tools must be taken out of service. District tools and equipment will not be loaned to Contractors.

Contractors are to provide and use required protective safety equipment and comply with all local, state, and federal safety laws and regulations.

Contractors are responsible for the reporting of accidents both to the District and their management and to obtain any emergency treatment that may be required.

Upon leaving the job site, all doors and windows must be locked, secured, or left as they were found prior to beginning the work.

Contractors are to provide their own site safety plan for areas that they are working in.

Contractors are reminded that there may be asbestos insulation in our buildings. They are not to disturb any insulation or enter any areas that contain asbestos-containing building materials. If they have any questions, contact the building engineer for directions.

Contractor is not to disable or interfere with any fire or burglary system equipment or telephone lines servicing such equipment. If equipment needs to be removed, relocated, or temporarily disabled, the Contractor needs to coordinate this with the building engineer.

The District will not tolerate acts of theft, vandalism, fighting, or abuse of the facilities or activities that threaten the security and safety of the school environment and its students, staff, and employees.

In summary, good judgment must be used to protect the learning environment. **Failure to comply with the above or to exhibit conduct which is deemed not to be in the best interest of the Huron Valley Schools will be grounds for immediate removal from the building and the project.**

1.4.1 Proposer Response:

☐	I have reviewed the above requirement(s) and agree with no exceptions.
☐	I have reviewed the above requirement(s) and have noted all exception(s) below.
List all exceptions:	

1.5 Service Capabilities

1.5.1 Communication Plan/Contract Management

Proposers must identify their company standards of communication as they relate to Contract performance, issue management, and change management. An issue is an identified event that, if not addressed, may affect schedule, scope, service, delivery, quality, or budget. A change is identified as a change in corporate leadership, structure, merger, or acquisition.

1.5.1 Proposer Response: *Please explain your communication plan/Contract management.*

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1.5.2 Primary Account Representative

Proposers must identify by name and location the primary account representatives and key contacts who will be responsible for the performance of a resulting Contract, as well as contact persons for reports and proposal documents. Include names, titles, address, phone number, and email addresses.

1.5.2 Proposer Response:

Name	Responsibilities	Address, Phone, Email
	Primary Account Rep	
	Contract Signee	
	Contract Performance	

1.6 Customer Service

It is preferred that the Vendor have an accessible customer service department with an individual specifically assigned to Huron Valley Schools. Customer inquiries should be responded to within 48 hours or two (2) business days unless it is an emergency issue. Describe your company's Customer Service Department (hours of operation, number and location of service centers, regular and emergency response times, etc.)

1.6 Proposer Response:

1.7 Service Authorization and Cooperative Use

Huron Valley Schools or an eligible participating entity may request an entity-specific scope and fee proposal from an awarded Contractor. Each ordering entity will independently determine its requirements, verify the Contractor's independence, select the Contractor, and issue its own purchase order, engagement agreement, or other written authorization. No Contractor shall begin work without written authorization from the applicable ordering entity. Each entity will be responsible for payment of its own obligations.

1.7 Proposer Response:

☐	I have reviewed the above requirement(s) and agree with no exceptions.
☐	I have reviewed the above requirement(s) and have noted all exception(s) below.
List all exceptions:	

1.8 Deliverables and Acceptance

Services and deliverables shall conform to the applicable RFP, accepted proposal, purchase order, and engagement agreement. The ordering entity may require the Contractor to correct incomplete, inaccurate, or nonconforming services or deliverables at no additional charge. Payment may be withheld for disputed or nonconforming work until the matter is resolved.

- Describe your procedures for receiving service requests, developing entity-specific scopes and fees, and obtaining authorization before beginning work?

1.8 Proposer Response: Please explain your service ordering processes and procedures.

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1.8.1 Reporting Capabilities

Awarded Contractors shall submit quarterly cooperative sales and utilization reports, and any other Contract administration reports required by Huron Valley Schools or PPIM.

1.8.1 Proposer Response:

☐	I have reviewed the above requirement(s) and agree with no exceptions.
☐	I have reviewed the above requirement(s) and have noted all exception(s) below.
List all exceptions:	

1.8.2 Nonconforming Services or Deliverables

Payment may be delayed when services or deliverables do not comply with the applicable scope, specifications, or Contract requirements. The Contractor shall promptly correct any incomplete, inaccurate, or nonconforming work at no additional cost to the ordering entity.

1.8.2 Proposer Response:

☐	I have reviewed the above requirement(s) and agree with no exceptions.
☐	I have reviewed the above requirement(s) and have noted all exception(s) below.
List all exceptions:	

1.9 Pricing Schedule

1. Price Guarantee

Price Stability Guarantee

The fee proposed for each Contract year in Attachment A shall be firm for that Contract year. No charge may exceed the applicable annual fee or rate stated in the awarded proposal unless the ordering entity authorizes a written scope change in advance. Fees for the three base Contract years may differ only when the differing amounts are expressly stated in **Attachment A – Pricing**.

Promotional Pricing

2. Proposal Pricing

Proposer may offer promotional pricing for awarded services during the Contract term. Upon promotion expiration, the pricing must return to the previous service price and remain in compliance with the Price Stability Guarantee.

3. Tax Excluded from Price

Proposal pricing must reflect Net 30 payment terms.

(a) Sales Tax: Huron Valley and local units of government are exempt from sales tax for direct purchases. The Proposer's prices must not include sales tax.

(b) Federal Excise Tax: Huron Valley and local units of government may be exempt from Federal Excise Tax, or the taxes may be reimbursable, if articles purchased under any resulting Contract are used for Huron Valley Schools' exclusive use. Certificates showing exclusive use for the purposes of substantiating a tax-free or tax-reimbursable sale will be sent upon request. If a sale is tax exempt or tax reimbursable under the Internal Revenue Code, the Proposer's prices must not include the Federal Excise Tax.

1.9 Proposer Response: Please provide any additional comments regarding pricing, promotions and discounts being offered, and information on other cooperative Contracts held by respondent in the response box below.

1.10 Price Assurance

The awarded vendor agrees to provide pricing to Huron Valley Schools and its participating entities, ensuring the lowest pricing available. If the awarded vendor has existing cooperative Contracts in place, Huron Valley Schools requests equal or better pricing to be submitted.



All pricing submitted to Huron Valley Schools shall include a 2.0% administrative/remittance fee to be payable to the Public Procurement Institute of Michigan (PPIM) by the awarded vendor. It is the awarded vendor's responsibility to keep all awarded pricing, cooperative sales reports, and required Contract records up to date and on file with Huron Valley Schools/PPIM.

1.10 Proposer Response:

☐	I have reviewed the above requirement(s) and agree with no exceptions.
☐	I have reviewed the above requirement(s) and have noted all exception(s) below.
List all exceptions:	

SECTION 2.0 – PROPOSER INFORMATION AND ACCEPTANCE

1. The undersigned declares that the proposal documents, including, without limitation, any RFP Addenda, Appendices, Attachments, and Exhibits, have been read.
2. The undersigned is authorized, offers, and agrees to furnish the articles and/or services specified in accordance with the Specifications, Terms & Conditions of the proposal documents of RFP # HV-946-09042026 Financial and Compliance Auditing Services.
3. The undersigned has reviewed the proposal documents and fully understands the requirements in this RFP and that each proposer who is awarded a Contract shall be, in fact, a prime Contractor, not a subcontractor, and agrees that its proposal, if accepted by Huron Valley Schools, will be the basis for the Proposer to enter into a Contract with Huron Valley Schools in accordance with the intent of the proposal documents.
4. The undersigned acknowledges receipt and acceptance of all addenda.
5. The undersigned agrees to the following terms, conditions, certifications, and requirements listed in all Sections of this RFP:
 - Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion
 - Certification Regarding Nondiscrimination Under Federally and State Assisted Programs
 - Assurance Regarding Access to Records and Financial Statements
 - Iran Economic Sanctions Act
 - Familial Relationship Disclosure
 - Non-Collusion Affidavit
 - Price Assurance Certification
6. The selected Contractor(s) will be required to sign a Confidentiality Agreement to protect the data supplied by the schools and agencies. The selected Contractor(s) will adhere to all provisions of the Federal Family Educational Rights and Privacy Act (FERPA, 20 U.S.C. 123g), Michigan Education Code, and District policies regarding the protection and confidentiality of data. At all times, the Contractor(s) will consider all data collected in the course of their duties to be protected and confidential.
7. The undersigned acknowledges that the Proposer will be in good standing in the State of Michigan, with all the necessary licenses, permits, certifications, approvals, and authorizations necessary to perform all obligations in connection with this RFP and associated proposal documents.
8. It is the responsibility of each proposer to be familiar with all the specifications, terms and conditions and, if applicable, the site conditions. By the submission of a proposal, the proposer certifies that if awarded a Contract, they will make no claim against Huron Valley Schools based upon ignorance of conditions or misunderstanding of the specifications.

9. Patent indemnity: Vendors who do business with the Huron Valley Schools shall hold Huron Valley Schools, its officers, agents, and employees, harmless from liability of any nature or kind, including cost and expenses, for infringement or use of any patent, copyright or other proprietary right, secret process, patented or unpatented invention, article or appliance furnished or used in connection with the Contract or purchase order.
10. Insurance certificates are not required at the time of submission. However, if awarded, the Contractor agrees to meet the minimum insurance requirements posted in the terms and conditions. This documentation must be provided to Huron Valley Schools before award and shall include an insurance certificate and additional insured certificate, naming Huron Valley Schools, which meet the minimum insurance requirements, as stated in the terms and conditions.
11. Should a Proposer find discrepancies in, or omissions from, the specifications, details, instructions and proposal forms, or should the Proposer be in doubt as to the meaning, the Proposer should notify Clayton Thompson (clayton.thompson@ppim.org), who will post an Addendum. The proposal contact shall not be responsible for any oral instructions.
12. It is the Proposer's responsibility to note any detail or specification that, in his opinion, is not practical or functional.
13. Interpretations and supplemental instructions will be issued by Addenda. No Proposer shall rely on any interpretations or corrections given by any other method. Interpretations, corrections, or changes of the Proposal Documents made in any other manner will not be binding.
14. Copies of addenda will be made available for inspection wherever Proposal Documents are posted.
15. Addenda will not be issued later than three (3) days (72 hrs.) before the date of receipt of proposals (excluding weekends and holidays), except an addendum withdrawing the request for proposals or postponing the proposal date.
16. Failure of Proposer to receive such addenda shall not relieve them from any obligation under the proposal as submitted.
17. Failure to comply with instructions stated in this section may result in rejection of proposal.
18. After a Contract agreement has been executed, the Contractor shall not be allowed any sum over and above the price(s) specified in the Contract agreement.
19. Huron Valley Schools requires all Contractor owners, employees, agents, representatives, subcontractors, and/or other personnel who will be present on School grounds to submit to a criminal history background check. This background check will include a requirement for each Contractor owner, employee, agent, representative, subcontractor, and/or other personnel to be screened before he/she enters School grounds. A valid State ID card or Driver's License is



required to complete the background check. Once screened, the District will provide approved personnel with a Contractor Badge with a unique number.

Solicitation Terms and Conditions – HVS/ CoPro+ Master Agreement Template: [Business Office | \(hvs.org\)](https://www.hvs.org/BusinessOffice)

2.1 Company Profile

Official Name of Company:		Type of Entity/Organization (check one): ☐ Corporation ☐ Joint Venture ☐ Limited Liability Partnership ☐ Partnership ☐ Limited Liability Company ☐ Non-Profit / Church ☐ Other: _____
Street Address:		
City:		
State:	Zip Code:	
Website:		
Primary Contact Name:		
Primary Contact Phone Number		
Primary Contact Email Address:		
Dun & Bradstreet (D&B) Number (if applicable):		
Has your company been debarred by the Federal Government? ☐ Yes ☐ No <i>If yes, has it been lifted, and if so, when?</i>		
Has your company been debarred by State Governments? ☐ Yes ☐ No <i>If yes, has it been lifted and if so, when?</i>		
Brief history of your company, including the year it was established:		
Signature:		
Name and Title of Signer:		
Date:		

Please include a current copy of a W-9 with your proposal.

2.2 References

Provide at least three references for public-school financial audit engagements performed within the past five years. Each reference must identify the entity, contact person and title, telephone number, dates serviced, services performed, and annual engagement value.

Entity Name:	
Contact Name:	Title:
City:	State:
Phone Number:	Years Serviced (mm/yy – mm/yy):
Description of Services:	
Annual Engagement Volume:	

Entity Name:	
Contact Name:	Title:
City:	State:
Phone Number:	Years Serviced (mm/yy – mm/yy):
Description of Services:	
Annual Engagement Volume:	

Entity Name:	
Contact Name:	Title:
City:	State:
Phone Number:	Years Serviced (mm/yy – mm/yy):
Description of Services:	
Annual Engagement Volume:	



2.3 Assurances and Certifications

Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion

The prospective Contractor certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participating in this transaction by any Federal department or agency. Where the prospective Contractor is unable to certify to any of the statements in this certification, such prospective Contractor shall attach an explanation to this proposal.

Certification Regarding Nondiscrimination Under Federally and State Assisted Programs

The applicant hereby agrees that it will comply with all federal and Michigan laws and regulations prohibiting discrimination and, in accordance therewith, no person, on the basis of race, color, religion, national origin or ancestry, age, sex, marital status or handicap, shall be discriminated against, excluded from participation in, denied the benefits of, or otherwise be subjected to discrimination in any program or activity for which it is responsible or for which it receives financial assistance from the U.S. Department of Education or the Michigan Department of Education (MDE).

Assurance Regarding Access to Records and Financial Statements

The applicant hereby assures that it will provide the pass-through entity, i.e., the Huron Valley Schools, and auditors with access to the records and financial statements as necessary for the pass-through entity to comply with 2 CFR, Part 200, Subpart F, and the Compliance Supplement for the U.S. Department of Education.

Iran Economic Sanctions Act

The prospective Contractor certifies that its organization, by submission of this proposal, is not an Iran-linked business. Please refer to the "Iran Economic Sanctions Act" Public Act 517 for clarifications or questions. Huron Valley Schools, as a Michigan public entity, is required to follow Public Act 517 of 2012.

Vendor Signature:
Date:

Notary
State of _____
County of _____
Sworn to and subscribed before me, a notary public in and for the above state and county, on this _____ day of _____, 20 ____.
Notary Public _____
My commission expires:



2.4 DISCLOSURE STATEMENT – FAMILIAL RELATIONSHIP

Pursuant to MCL 380.1267, a sworn and notarized statement disclosing any familial relationship that exists between the owner or any employee of the Proposer, and any member of the Huron Valley Schools Board of Education or the Huron Valley Schools District Superintendent must be accompanied by the proposal.

Proposals without this disclosure statement will not be accepted.

The members of the Huron Valley Schools Board of Education are listed on the following website:

<https://www.hvs.org/page/board-of-education>

Dr. Paul Salah is Huron Valley Schools' Superintendent.

The Following are the familial relationships:

☐ There are none.

Vendor Signature:
Date:

Notary
State of _____
County of _____
Sworn to and subscribed before me, a notary public in and for the above state and county, on this _____ day of _____, 20 ____.
Notary Public _____
My commission expires:



2.5 NON-COLLUSION AFFIDAVIT

STATE OF MICHIGAN)
)
[NAME OF COUNTY]) ss:

The undersigned proposer or agent, being duly sworn on oath, says that he/she has not, nor has any other member, representative, or agent of the firm, company, corporation, or partnership represented by him/her, entered into any combination, collusion, or agreement with any person relative to the price to be bid by anyone at such letting nor to prevent any person from bidding nor to induce anyone to refrain from bidding, and that this proposal is made without reference to any other proposal and without any agreement, understanding, or combination with any other person in reference to such bidding.

He/she further says that no person or persons, firms, or corporation has, have, or will receive directly or indirectly, any rebate, gift, fee, commission, or thing of value on account of such sale.

Proposer (Firm)

Signature of Proposer or Agent

Notary
State of _____
County of _____
Sworn to and subscribed before me, a notary public in and for the above state and county, on this _____ day of _____, 20 _____.
Notary Public _____
My commission expires:

(Return this completed form electronically with proposal)

SECTION 3.0 – PROPOSAL, EVALUATION, SELECTION & AWARD PROCESS

This section contains key project dates and activities as well as instructions to proposers on how to prepare and submit their proposal:

TIMETABLE	
Release of RFP:	October 6, 2026
Proposer Questions Due by (12:00 PM Eastern Time):	October 19, 2026
Answers to Questions Posted:	October 26, 2026
Proposals Due by (12:00 PM Eastern Time)*:	November 6, 2026
Master Agreement Award Date:	December 2026

***Responses received later than the specified deadline will be disqualified.**

3.1 Huron Valley Schools Responsibility

Huron Valley Schools is not responsible for representations made by any of its officers or employees prior to the execution of the Master Agreement unless such understanding or representation is included in the Master Agreement.

3.2 Truth and Accuracy of Representations

False, misleading, incomplete, or deceptively unresponsive statements in connection with a proposal shall be sufficient cause for rejection of the proposal. The evaluation and determination in this area shall be at the Huron Valley Schools Administrator/Purchasing Agent designee's sole judgment, and his/her judgment shall be final.

3.3 Proposer Questions

Proposers may submit written questions regarding this RFP by e-mail to the address identified below. All questions must be received by 12:00 pm ET (Eastern Time) no later than Monday, October 19, 2026. All questions, without identifying the submitting company, will be compiled with the appropriate answers and issued as an addendum to the RFP.

When submitting questions, please specify the RFP section and paragraph number and quote the language that prompted the question. This will ensure that the question can be quickly found in the RFP. Huron Valley Schools reserves the right to group similar questions when providing answers. Questions should be addressed to:

Email address: clayton.thompson@ppim.org



Huron Valley Schools may modify the RFP at any time during the process. All changes to the RFP will be posted under the proposal number, and each posting officially revises the RFP.

3.4 Preparation of the Proposal

Each Proposer must submit a complete proposal in response to this RFP. The proposal must remain valid for at least 120 days from the due date for responses to this RFP.

The Proposer will be responsible for completing and submitting the following sections of this RFP:

Section 1.0 – Proposal Responses to Scope of Work and Pricing - The Proposer's proposal must include detailed responses to each of the outlined requirements in the text boxes provided. There is no requirement or limitation on the number of words for these responses.

Section 2.0 – Proposer Information and Acceptance – The Proposer will be required to complete the information in this section and provide required signatures and notarization.

3.5 Proposal Submission Deadline

The Deadline for receipt of Proposals is Friday, November 6, 2026, 12:00 PM Eastern Time (the "Due Date"). Any proposals received after this time will not be opened.

E-mail the proposal, with the subject line as **HV-946-09042026 Financial and Compliance Auditing Services**, to:

bids@hvs.org

Below is the Microsoft Teams invite if you are interested in attending.

Topic: Proposal Opening – Financial and Compliance Auditing Services
Day/Time: November 6, 2026, 12:10 PM Eastern Time (US and Canada)

Microsoft Teams meeting

Join: <https://teams.microsoft.com/join/297027822616876?p=QkdWqxNbVRb7TTcZ1U>

Meeting ID: 297 027 822 616 876

Passcode: hA7io3iw

3.6 Adherence to Minimum Mandatory Requirements (Pass/Fail)

Huron Valley Schools Administrator or designee shall review Section 1.1 Minimum Mandatory Requirements and determine if the proposer meets the minimum mandatory requirements as outlined in this RFP.

Failure of the proposer to comply with the minimum mandatory requirements may eliminate its proposal from any further consideration. Huron Valley Schools may elect to waive any informality in a proposal if the sum and substance of the proposal is present.

3.7 Evaluation Process

All proposals will be reviewed for compliance with the minimum mandatory requirements stated within this RFP. Proposals not meeting the minimum mandatory requirements will be deemed non-responsive and eliminated from further consideration. Huron Valley Schools may elect to waive any informality in a proposal if the sum and substance of the proposal is present.

- A. Huron Valley Schools may contact the proposer for clarification of the proposal.
- B. Huron Valley Schools may use other sources of information to perform the evaluation.
- C. Huron Valley Schools may require the proposer to submit additional and/or supporting materials.

Responsive proposals will be evaluated on the factors identified in this RFP. The Proposer(s) whose proposal is most advantageous, taking into consideration the evaluation factors, will be recommended for award approval.

After a prospective vendor(s) has been selected, Huron Valley Schools and the prospective vendor(s) will negotiate a Master Agreement. If a satisfactory Master Agreement cannot be negotiated, Huron Valley Schools may, at its sole discretion, begin negotiations with the next qualified proposer who submitted a proposal. It is anticipated that pre-qualified Contract awards will be made to multiple vendors.

A solicitation may be cancelled, or any or all proposals may be rejected in whole or in part, when it is in the best interest of Huron Valley Schools in accordance with regulations.

3.8 Evaluation Criteria

- 1. Evaluation Factors for Scope of Work and Requirements (Section 1) – 15 points
 - 2. Company Profile (Section 2.1) - 15 points
 - 3. References (Section 2.2) – 25 points
 - 4. Vendor Questionnaire (Appendix A) – 15 points
 - 5. Pricing – 30 points
- Total points possible = 100 points

Award(s) shall be made to the most responsible vendor(s) whose proposal is determined to be best value to Huron Valley Schools, taking into consideration the terms and conditions set forth in this RFP. A valid and enforceable Contract exists when an agreement is fully executed between Huron Valley Schools and a vendor.

3.9 Optional Tools to Enhance Evaluation Process



Huron Valley Schools during the evaluation of proposals may find it necessary to utilize one or multiple tools, as listed below, to facilitate their understanding of the proposal(s) in order to select the best offering to Huron Valley Schools:

- Clarifications
- Deficiency Report
- Oral Presentation
- Site Visit
- Best and Final Offer (BAFO)
- Negotiations

3.10 Huron Valley Schools Option to Reject Proposals

Huron Valley Schools may, in its sole and absolute discretion, reject any or all proposals submitted in response to this RFP. Huron Valley Schools shall not be liable for any costs incurred by the proposer in connection with the preparation and submission of any proposal. Huron Valley Schools reserves the right to waive inconsequential disparities in a submitted proposal.

3.11 Freedom of Information Act

This Contract and all information submitted to Huron Valley Schools by the Contractor and proposers is subject to the Michigan Freedom of Information Act (FOIA), 1976 PA 442, MCL 15.231, et seq.

Huron Valley Schools shall not, in any way, be liable or responsible for the disclosure of any such record or any parts thereof, if disclosure is required or permitted under the Michigan Freedom of Information Act or otherwise by law. The Proposer(s) must specifically label only those provisions of the proposal which are actually trade secrets, confidential, or proprietary in nature. A blanket statement of confidentiality or the marking of each page of the proposal as "Trade Secret", "Confidential", or "Proprietary" shall not be permitted. Any such designation will be disregarded.

By submitting a response to this RFP, the Proposer shall be deemed to have agreed to indemnify and hold harmless Huron Valley Schools for any liability arising from or in connection with Huron Valley Schools' failure to disclose, in response to a request under the Michigan Freedom of Information Act, any portion or portions of the Proposer's response to this RFP which have been marked "Trade Secret," "Confidential," or "Proprietary."

3.12 Contacts with Huron Valley Schools Personnel

All contact with Huron Valley Schools regarding this RFP or any matter relating thereto must be e-mailed as follows:

Email address: clayton.thompson@ppim.org

If it is discovered that a Proposer contacted and received information regarding this solicitation from any Huron Valley Schools personnel other than the Procurement Contact, Huron Valley



Schools, in its sole discretion, may disqualify its proposal from further consideration. Only those communications made by Huron Valley Schools in writing will be binding with respect to this RFP.

3.13 Final Agreement Award Determination

Huron Valley Schools reserves the right to make one total award, one award for each category/section, multiple awards, or a combination of awards, and to exercise its judgment concerning the selection of one or more proposals, the terms of any resultant agreement(s), and the determination of which, if any, proposal(s) best serves the interests of Huron Valley Schools.

Attachment A – Pricing

Proposers must provide, for each Contract year, the estimated hours, hourly rate, and total cost for each service category, together with a total annual project cost for the complete scope of services. HVS will evaluate pricing based on the total annual project costs proposed for 2027, 2028, and 2029.

Charges for the required scope of services shall not exceed the stated annual project cost without prior written authorization from the applicable contracting entity. Pricing must include the required 2% CoPro+ administrative fee.

Service Category	Description	Estimated Hours	Hourly Rate	Total Cost	Notes
Planning and Risk Assessment	Initial planning, risk identification, and strategy development.				
Internal Control Testing	Evaluation and testing of internal controls				
Fieldwork and Data Analysis	On-site examination of financial records and interviews				
Compliance Testing	Testing for compliance with applicable laws and regulations				
Audit Report Preparation	Drafting and finalizing the audit report				
Presentation and Consultation	Presentation of findings to the board and consultations				
Additional Services	Any additional services requested outside the standard scope				

2027 Total Cost =	
2028 Total Cost =	
2029 Total Cost =	
2030 Total Cost* (Option Year One) =	
2031 Total Cost* (Option Year Two) =	

*Optionally included; only base contract years will be utilized for evaluation purposes.

If there are cost increases for 2028 and/or 2029, please explain.



Appendix A – Vendor Questionnaire

Firm Name:

1. How many Michigan school audits and single audits has your firm served in each of the last two years? Please provide a current listing, other than references provided in Section 2.2, indicating dates when services were provided for each client, and contact people.
2. Number of other governmental (fund accounting) audits your firm has conducted in each of the last two years? Please provide a list of names and contact people, other than references provided in Section 2.2
3. How many educational clients does your organization currently serve with the type of services described? Please describe in detail the capacity of the services being provided.
4. How many employees does your firm employ?

Description	Number
Full-Time Employees	
Part-Time Employees	
Certified Public Accountants	
Employees Assigned to the Governmental/Education Audit Practice	

5. Submit profiles of staff to be assigned to this project and examples of similar work performed by each staff member.
6. How are educational auditors/consultants managed within your organization?



7. Provide a list of your firm's involvement in public school type organizations; i.e., legislative and Department of Education committees, Michigan School Business Officials, Association of School Business Officials, MICPA Committees, etc.
8. Provide a list of public schools your firm has audited which have obtained the Association of School Business Officials (ASBO) Certificate of Excellence in Financial Reporting. List any participation by your firm in ASBO's Certificate of Excellence in Financial Reporting Program.
9. Provide a list of public schools for which your firm has prepared an audited annual comprehensive financial report (ACFR).
10. Outline your requirements related to physical work conditions to be provided by the entity for on-site work.
11. What are your firm's billing procedures?

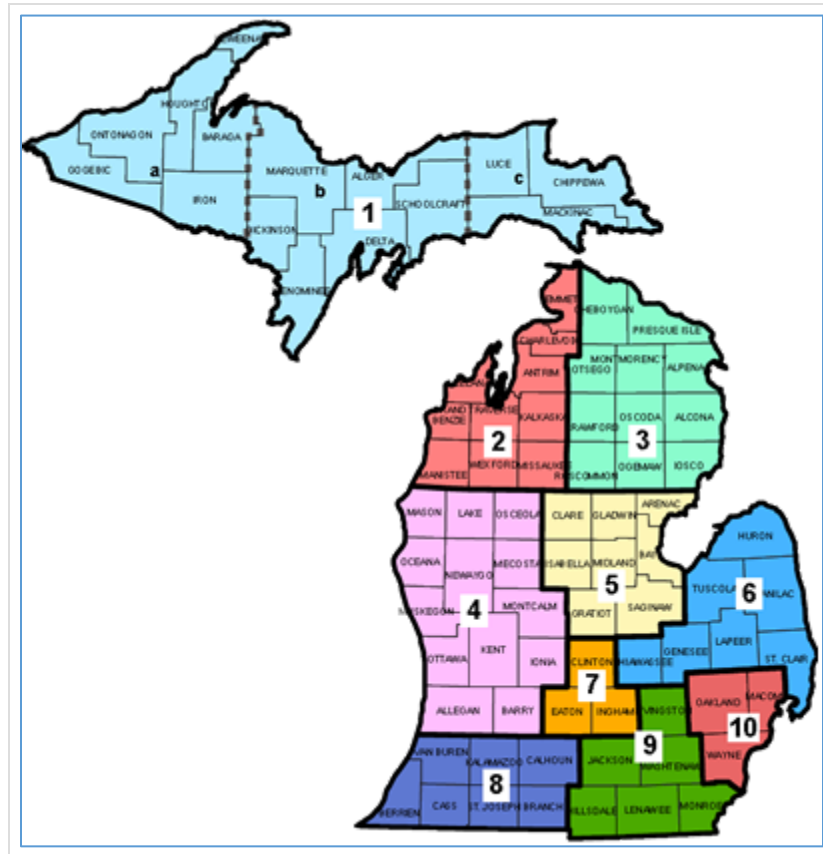
The undersigned hereby declares that he/she has carefully examined the general conditions and specifications and will provide professional financial and compliance auditing services for the price outlined in this proposal. Any changes to the specifications and their impact on the final cost will be discussed and mutually agreed upon before the delivery of the services.

It is understood that all proposed prices shall remain in effect for at least 120 days from the date of the proposal opening to allow for the award and that, if chosen, the successful vendor's prices will remain firm through invoice.

Proposer warrants that it is willing and able to obtain insurance policies as described herein, together with an errors and omissions insurance policy providing the prescribed amount of coverage for the willful or negligent acts, or omissions of any officers, employees or agents thereof.

Authorized Representative Name	
Title	
Signature	

APPENDIX B – Regional Services Map



1. Upper Peninsula
2. Northwest
3. Northeast
4. West
5. East Central
6. East
7. South Central
8. Southwest
9. Southeast
10. Detroit Metro

Appendix B – Regional Services Map Proposer Response: Please indicate the regions you provide services for/to.

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