

Southwest Institute for Education and Conservation

701 Camino del Rio, Suite 101

Durango, Colorado 81301

Request for Proposal for Audit Services

Purpose

The purpose of this request for proposal (RFP) is to engage the services of a qualified firm of certified public accountants to provide auditing services to the Southwest Institute for Education and Conservation (SIEC) a 501(c)25 non-profit organization.

Services Required

The scope of the prospective engagement will be to perform a financial audit of SIEC for the years ending December 31, 2026 - 2028. The firm selected will be expected to provide consultation and compilation services in the preparation of the basic financial statements in conformity with generally accepted accounting principles (GAAP) and for the preparation of the comprehensive annual financial audit and 990 report.

Description of Entities to be Audited

SIEC is a non-profit, 501 (c)25, with 2 501 (c) parent organizations: Durango Education Center (DAEC) and Conservation Legacy (CL). SIEC was created to oversee the finances and operations of "The Commons Building" after its purchase by DAEC and CL. The Commons Building, located at 701 Camino del Rio, Durango, CO., houses the Durango offices of both DAEC and CL as well as several non-profit and commercial tenants.

A copy of last year's financial statements will be emailed on request.

A SIEC Board of Directors made up of officers from DAEC and CL and representatives of other tenants of the building oversees the operations and finances.

Inquiries

This request for proposal (RFP) is issued by the SIEC. All sealed proposals should be delivered to:

Conservation Legacy
701 Camino del Rio, Suite 101
Durango, CO 81301

Or securely sent to: kevin@conservationlegacy.org

All inquiries for information regarding SIEC should be directed to:

Kevin Heiner
Senior VP Operations – Conservation Legacy & SIEC Board President
(970) 946 - 4762

Qualifications Required

In order to be considered, the firm presenting the proposal must be a firm of certified public accountants eligible by law to practice public accounting in the State of Colorado.

Required Proposal Content

1.) Firm Resume

Identify firm name, telephone number, and the name of the individual to contact. Include structure, history, principals, number of employees, and a copy of your Colorado License.

2.) Non-Profit client listing

Provide a list of Colorado non-profit audit clients that the local office of your firm has performed audits for in the past three years and a key contact person within the organization.

3.) Peer Review

Provide a copy of your firm's latest peer review report.

4.) Personnel Assignments

List the personnel you expect to assign in the audit and identify their experience with non-profit audits. Describe any specialized skills, training, or background in public accounting.

5.) Proposed Fee Schedule

Provide your fee schedule for appropriate classification of employees who would be involved in the SIEC audit. Please quote a maximum audit fee for each year of the three-year engagement, beginning with year end December 31, 2026 audit, separated into the cost of the audit and of compiling the financial statements. Also, include any expenditure that may be billed over and above the audit fee. Please provide a copy of your standard contract, if available.

6.) Additional Assistance

Provide a listing or narrative describing other services your firm could provide to the SIEC.

7.) Additional Comments

Please add additional comments, background information, data, etc., which you feel are pertinent and would assist in the selection process.

Time Requirements

The following deadlines are presently anticipated:

RFP emailed to prospective bidders	October 30, 2026
Prospective bidder's inquiry deadline	November 16, 2026
Proposal deadline	November 30, 2026

Notification of bid selection	December 16, 2026
Engagement of successful firm; fieldwork can begin End of accounting period	January 1, 2027
Submit audit report to the Board for review	June 30, 2027
Submit final audit report & Management Letter Submit 990	September 1 ,2027
Submit 990s ready for public presentation Submit two (2) printed copies of audit.	Sept 15, 2027

Evaluation Process

The SIEC Board of Directors will judge the merits of proposals received in accordance with the criteria discussed below. The bidder is responsible for providing all information requested in this RFP and failure to do so may result in disqualification of the proposal. During the evaluation process, the Board may request firms to complete an oral presentation or answer further questions about their proposal.

Criteria:

- Certified public accounting firm licensed to practice in the State of Colorado.
- A peer review completed with the past three years.
- The adequacy and completeness of the proposal.
- The experience of the firm
- The experience and qualifications of staff to be assigned to the audit.
- The proposed cost of the audit.

Right to Reject Proposal

The SIEC reserves the right to reject any or all proposals and accepts no responsibility for the cost of proposal preparation.