



3 Court Street, Norwich, NY 13815
GuernseyMemorialLibrary.org
guernsey@4cls.org
(607) 334-4034

March 17, 2025

Dear Sir or Madam:

Our organization is accepting proposals from CPA firms to provide financial auditing services for our organization for one to three years beginning with the July 2023 - June 2024 fiscal year. We invite your firm to submit a proposal to us by Friday, April 25, 2025 at 6 PM for consideration. A description of our organization, the services needed, and other pertinent information follows:

Guernsey Memorial Library is a school district public library, serving the approximately 13,000 residents of the Norwich City School District in Norwich, NY. We are also the largest public library in Chenango County, NY, and a member of the Four County Library System. Our annual budget this year is \$1,276,600, and we employ approximately 16 FTE employees in one location.

Your proposal is expected to cover an annual financial audit and meetings with audit committee and or board of directors, as necessary

Following are key contacts for information you may seek in preparing your proposal:

Patti Giltner	President, Board of Trustees	pattigil@roadrunner.com
Wendy Burdick	Treasurer	wburdick@norwichcsd.org
Connie Dalrymple	Director	no.connie@4cls.org

Requests for additional information, visits to our site, review of prior financial statements, and appointments should be coordinated through our director. Please return the completed proposal to her attention at the address provided.

These services have previously been provided by D'Arcangelo & Co, LLP, CPAs. This is a routine, periodic request for proposals. In preparing your proposal, be advised that management will give permission to contact the prior auditors.

In responding to this request, we request the following information:

1. Detail your firm's experience in providing financial auditing and tax services to not-for-profit organizations, as well as organizations of a comparable size to Guernsey Memorial Library.
2. Provide information on whether you provide services to any related organizations.
3. Discuss the firm's independence with respect to Guernsey Memorial Library.
4. Discuss commitments you will make to staff continuity, including your staff turnover experience in the last three years.

5. Identify the partner, manager, and in-charge accountant who will be assigned to our job if you are successful in your bid, and provide biographies. Indicate any complaints against them that have been leveled by the state board of accountancy or other regulatory authority, if any. Indicate any corrective actions that have been taken by the firm with respect to these individuals.
6. Describe how your firm will approach the audit of the organization, including the use of any association or affiliate member firm personnel and the areas that will receive primary emphasis. Also discuss the firm's use of technology in the audit. Finally, discuss the communication process used by the firm to discuss issues with management and the board.
7. Set forth your fee proposal for the 2023-2024 financial audit, with whatever guarantees can be given regarding increases in succeeding years. Your fee proposal should also delineate hours by level of staff.
8. Describe how you will bill for questions on technical matters that may arise throughout the year.
9. Furnish current standard and discounted billing rates for personnel.
10. Provide the names and contact information for other similarly sized clients of the partner and manager that will be assigned to our organization for reference purposes.
11. Describe how and why your firm is different from other firms, and why our selection of your firm as our external accountants is the best decision we could make.
12. Include a copy of your firm's most recent peer review report, the related letter of comments, and the firm's response to the letter of comments.

Guernsey Memorial Library will evaluate proposals on a qualitative basis. This includes our review of the firm's peer review report and related materials, interviews with senior engagement personnel to be assigned to our organization, results of discussions with other clients, and the firm's completeness and timeliness in its response to us.

We would also appreciate a response if you decline to submit a proposal.

Sincerely,

A handwritten signature in blue ink, appearing to read "Connie Dalrymple".

Connie Dalrymple, Director