



Tender Specification: Auditing Services

Overview

Together Active is seeking to appoint an experienced, qualified external auditor for the provision of audit and related services for our organisation.

We want dedicated support from a team who have a proven track record of working within the charity sector and of facilitating effective working relationships to create a smooth straightforward audit process.

Our Vision

Design out inactivity across Staffordshire and Stoke-on-Trent.

About Us

We are an independent charity and the Active Partnership for Staffordshire and Stoke-on-Trent. We promote physical activity as a tool to improve the lives of some of the most overlooked and unheard populations by working across three priority areas:

- Health and Wellbeing
- Social Inclusion
- Powerful Communities

Our work focuses on population groups who experience one or more of the following:

- Mental health distress
- A long-term physical health condition
- Low or no income
- Exclusion as a result of gender and/or race

We collaborate with partners from systems across Staffordshire and Stoke-on-Trent to work toward our vision.

Scope of Services

The selected provider will be required to deliver the following services for the 2024-25 accounting period initially:

Annual statutory audit in accordance with the Charities Act 2011 and Charities SORP FRS 102 in addition to the relevant accounting and auditing standards, including but not limited to:

- Year-end planning including pre year end meeting
- Key risk identification and mitigation
- Documenting systems in detail and performing walkthrough tests to confirm operations.
- A hybrid approach with the potential for some face-to-face meetings if needed
- Drafting audit report and management controls report
- Attendance as required at Board and sub-committees to report on findings

In addition:

- Production of year-end financial statements
- The production of corporation tax, capital allowance computations and form CT600 annually.

Additional advice / services to be made available including

- Advice on taxation matters
- Accounting and payroll query support

A key contact to provide support throughout the year for ad hoc queries related to finance and audit processes.

Experience and Qualifications

Prospective providers must demonstrate:

- Proven experience of delivering tax audit and compliance services in the not-for-profit sector as a registered auditor
- Chartered accountant with relevant audit qualification and up to date registration
- Track record of working within the charity sector
- Excellent communication skills to facilitate a productive and straightforward audit process

TOGETHER ACTIVE

Staffordshire & Stoke-on-Trent

Previous experience of working with Active Partnerships and similar organisations would be advantageous. [Proposal Requirements](#)

Interested providers should submit a proposal including the following:

- Company overview and relevant experience.
- Profiles of the auditors/key contacts we will be working directly with.
- Detailed approach and suggested timeline from planning to final completion.
- Business continuity plan particularly in the case of staff absence.
- Pricing structure and total cost.
- Two references from previous clients.

Safeguarding, Equality, Diversity, and Inclusion

Together Active is committed to promoting a safe, inclusive, and diverse working environment. The selected provider must demonstrate a commitment to safeguarding, and additionally, the provider must promote equality, diversity, and inclusion (EDI) throughout the process.

Submission

Please submit your proposal **by 9am on Friday 26th July** to hello@togetheractive.org with the subject line Tender Response: Audit Services

It is your choice how proposals are presented, however submissions should not exceed 2,000 words overall.

If you have additional accessibility requirements, please contact us and we can offer alternative submission arrangements if needed. Providers may be asked to attend a clarification interview if required.

Contact Information

For any queries regarding this tender or an informal discussion, contact hazellthorogood@togetheractive.org or by phone – 07800 619681

Contract Award

The contract will be awarded by 16.08.24

Confidentiality

Providers must maintain the confidentiality of any information provided by Together Active throughout the tender process.

Non-Discrimination

Together Active is committed to equal opportunities, and providers must ensure non-discrimination in their proposal and service delivery.

We look forward to receiving your proposal

Scoring Criteria for Audit Services Tender

To ensure a transparent and objective evaluation process, we will use the following scoring criteria for assessing tender submissions. Each section of the proposal will be evaluated based on clear metrics and assigned a score. The total score will determine the selection of the most suitable consultant.

Total Score: 100

Approach and Methodology (15 points)

- Detailed and clear approach: 15 points
- General approach with some customization: 8-14 points
- Broad or vague approach without specifics: 0-7 points

Timeline (10 points)

- Clear and realistic timeline with defined milestones: 10 points
- Adequate timeline with some milestones: 5-9 points
- Unclear or unrealistic timeline with few or no milestones: 0-4 points

Proven experience in delivering audit and taxation services within the non-profit or public sectors (10 points)

- Comprehensive experience with similar organizations: 10 points
- Partial or related experience: 5-9 points
- Limited or no relevant experience: 0-4 points

Demonstrable experience of working with Active Partnerships (10 points)

- Comprehensive experience: 10 points
- Partial or related experience: 5-9 points
- Limited or no relevant experience: 0-4 points

Accredited Auditing qualifications (5 points)

- Full accreditation 5 points
- Partial or pending accreditation: 1-4 points
- No accreditation: 0 points

Strong track record of working with similar organisations to facilitate a smooth and well administered audit process (5 points)

- Demonstrated impact with measurable outcomes: 5 points
- Anecdotal evidence without clear metrics: 1-4 points
- No track record provided: 0 points

Ability to provide ad hoc support throughout the year above and beyond the standard audit process: (15 points)

- Clear offer to provide ad hoc support – 15 points
- Partial availability to provide support: 8-14 points
- Minimal opportunity for ad hoc support: 0-7 points

Detailed breakdown showing excellent value for money: (15 points)

- Adequate breakdown with reasonable value: 8-14 points
- Poor breakdown or not justifying the cost: 0-7 points

References from previous clients (15 points)

- Excellent feedback with strong recommendations: 15 points
- Good feedback with minor reservations: 7-14points
- Mixed or poor feedback: 0-4 points

Proposals will be evaluated based on the above criteria. Submissions may be shortlisted and applicants may be invited to a clarification interview. In the event of a tie, the proposal that demonstrates the greatest alignment with Together Active's mission and strategic goals will be prioritised