

**Connecticut Fuel Oil Conservation Fund, Inc.**

**Request for Proposal**

**Audit and Tax Services**

The Connecticut Fuel Oil Conservation Fund, Inc. is seeking to engage a Connecticut licensed and based public accounting firm to complete an independent audit of the Organization's financial statements for the year ending June 30, 2009 along with the preparation of the Organization's Form 990.

The Fund is a 501(c)(3) nonprofit organization which was created by PA 07-242 Sec. 116 as amended by June Sp. Sess. PA 07-1 Sec. 131. The Fund is a thirteen-member appointed board, which includes representatives from an environmental advocacy group, consumer advocacy group, consumer advocacy organization, a low-income ratepayers representative, state residents, wholesale and retail fuel oil dealers and their trade association, an in state generator, HVAC trades, the Heating, Piping, Cooling and Sheet Metal Work Board, and the business community. The Fund was formed to administer conservation programs, including programs that benefit low-income persons; research, development and commercialization of products or processes; support for energy use assessment, engineering studies and services related to new construction or major building renovations; the design, manufacture commercialization and purchase of energy-efficient appliances and heating devices; program planning and evaluation; joint fuel conservation initiatives and programs targeted at saving more than one fuel resource; and public education regarding conservation. During the fiscal year the Fund received 2.5 million dollars of funding from the State of Connecticut to pursue its fuel oil conservation initiatives.

**Scope of Work – Professional Services**

- 1.) Perform a comprehensive audit of the financial statements of the Fund for the fiscal year ending June 30, 2009 (initial year of operation) in accordance with generally accepted auditing standards.
- 2.) Evaluate requirements and perform an audit in accordance with the Connecticut State Single Audit Act.
- 3.) Prepare Internal Revenue Service Form 990

**Requirements for the Contents of the RFP:**

- 1.) Overview of the Firm describing the type of services your firm provides, noting the experience your firm has with not-for-profit organizations.
- 2.) Brief bios on partners, managers and staff that would be responsible for the work.
- 3.) Copy of your most recent peer review letter

The Fund will provide:

- 1.) Draft financial statements, fully footnoted.
- 2.) Draft of Form 990 for final preparation.
- 3.) Detailed general ledger and vendor payments.
- 4.) Copy of Articles of Incorporation, Bylaws, IRS Determination Letter and Board meeting minutes.
- 5.) Any other requested documents.

The expected start date of the audit would be no later than August 1, 2009 with completion and delivery of the audit to the Audit Committee of the Fund by no later than October 31, 2009.

The Fund reserves the right, in its sole discretion, to reject any or all proposals, to waive any minor irregularities or informalities in a proposal, ensure conflicts of interest are avoided, and to enter into an agreement deemed by the Fund to be in the best interest of Connecticut fuel oil customers.

Firms should submit a proposal including their qualifications by no later than June 12, 2009 to:

Connecticut Fuel Oil Conservation Fund Inc.  
P.O. Box 339  
Litchfield CT 06759

Or by email at:  
[admin@ctfocb.com](mailto:admin@ctfocb.com)

Additional information regarding the Fund can be found at [www.ctfocb.com](http://www.ctfocb.com). Questions and requests for information can be directed to David Pelletier, Fund Treasurer by email at [dpelletier@budwitzmeyerjack.com](mailto:dpelletier@budwitzmeyerjack.com) or by telephone at (203) 272-1621.