

Invitation to Tender

External Audit



Brief history

Pecan was established in 1989 as a response by the local churches to some of the social and emotional issues facing people in Peckham. Since then the charity has provided practical and emotional support to people in challenging situations through a variety of support mechanisms. This includes but is not exclusive to providing services for people facing issues such as unemployment, criminal records, hunger, disabilities, and other social, physical, and emotional barriers. This vision remains alive in the provision of our services across the London Borough of Southwark and beyond.

Services provided

Our aim is to empower people to take charge of the direction of their lives and to make the best of opportunities whatever the circumstances. The services we provide enable individuals to acquire access to various personal and professional development opportunities. These include employment projects that offer qualification support, assistance with securing employment, and skills-based coaching. We also provide a number of food services through Southwark Foodbank as well as sustainable access to healthy food. In addition, we offer trauma-informed coaching, collaborative skills sharing and networking opportunities through dedicated projects such as Southwark and Lewisham Women's Hubs. We value our client experience, and we endeavour to ensure that our core values of **kindness, belief, and hope** are consistently demonstrated and experienced by all.

As we continue to support our communities, we also aspire to champion more of a campaigning, research and influencing role. Core to everything we do is working in partnership with other charitable organisations, the local authorities, the NHS and other key players to ensure that people have access to the right support at the right time.

More information on the services provided by Pecan can be found on the website www.pecan.org.uk

Charity information

Pecan's charity registration number is 801819 and a registered company number 2394165. The Main Office is located at 121A Peckham High Street, London SE15 5SE. Pecan's principle governing document is its Articles of Association and Memorandum. Copies of the Memorandum and Articles are available on the Charity Commission website <https://register-of-charities.charitycommission.gov.uk/charity-search/-/charity-details/801819/governing-document> and Pecan's main office. Since 2019 Pecan has consistently had an income of over £1m.

The Chief Executive Officer Chris Price heads a team of 42 paid staff in addition to a pool of volunteers and is responsible with the Trustees for the strategic direction and for the day-to-day operational activities of the organisation. He is supported by the senior leadership team (SLT) and reports to the Board of Trustees.

External and audit services tender

Pecan invites tenders from suitable qualified and competent registered auditors with extensive knowledge and understanding of the charity sector for the function of external audit. The external audit and services required will include but are not limited to:

- Planning, management and execution of the annual audit of Pecan 's Financial Statement and Trustee's report
- Providing technical advice on all aspects of accounting and financial reporting
- Updating the Trustees with changes in legislation and regulation. Reporting on external audit progress to Pecan's Management Team, including attendance at Committee meetings and Board meetings as required
- Provision of advice to Pecan Senior Leadership Team, in particular the CEO, the Treasurer, and the Head of Finance & Resources on accounting and financial matters
- Liaising and coordinating with the Head of Finance & Resources to ensure full exchange of information
- Submission of Financial Statement & Report to the Companies House

Proposed Contract

The contract will be for an initial three-year period commencing from May 2022 and will be subject to annual appointment ***by the members at their annual general meeting.***

Tender Requirement

Tenders should include the following information:

- The fee for the first year of the contract period specifying what is included in the charge
- Costs should be provided on a per hour basis for any additional advice or services that may be required on occasion.

- An indication of the level of fees that will be charged in the subsequent periods of the contract.
- A schedule of hourly rates for each level of fee earning staff.
- CVs of senior staff such as the Audit Partner and Manager plus key supporting personnel who would conduct the external audit.
- An explanation of the external audit approach that will be used including the firm's policy in relation to maintenance of continuity of staff involved in the audit. Details of relevant experience within the charity sector and the business activities and issues addressed.
- Details of references that might be used by Pecan.
- Details of any relevant services that may be appropriate to the needs of Pecan.

Shortlisted firms will be invited to an interview and/or to deliver a presentation Pecan interviewing Panel, consisting of Treasurer, Chief Executive Officer, and Head of Finance & Resources

Interviews are expected to take place on 25th or 26th April 2022

For further information or clarification please contact Sylvie Bissileu Head of Finance and Resources

Deadline

The deadline for responses to this tender is 5pm Monday 11th April 2022. Your tender proposal should be submitted via email or post marked confidential tender to:

sylvie.bissileu@pecan.org.uk

Assessment of Tenders

Tenders will be assessed on the following criteria:

- Experience of providing comprehensive external audit services to the charity sector and demonstrable expertise in accounting for charities
- Experience of advising charitable bodies with similar needs within the last three years and evidence of understanding the challenges and constraints within the sector
- The quality and experience of the proposed external Auditor
- The suitability of the audit approach
- The ability to provide the full range of services required for audit
- The firm's approach to customer service, quality assurance and environmental considerations.
- Value for money, particularly the added value that the audit process will bring to the organisation.

A decision on appointment will be made very shortly after the interview/presentation