



Peoria Tribe of Indians of Oklahoma

Request for Proposal (RFP)

ACCOUNTING SERVICES

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Dear Prospective Bidder,

We invite qualified and experienced accounting service providers to submit proposals for the provision of professional accounting services. This initiative aims to ensure financial accuracy, compliance, and operational efficiency through expert financial support.

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01.

PURPOSE OF THE RFP

Peoria Tribe of Indians of Oklahoma is issuing this Request for Proposal (RFP) to invite qualified accounting service providers to submit proposals for professional accounting services.

The goal is to engage a vendor capable of delivering reliable, compliant, and efficient financial solutions tailored to our organizational needs.

02.

ORGANIZATION BACKGROUND

Peoria Tribe of Indians of Oklahoma is a federally recognized Tribe with many different business ventures and organizations that are all committed to providing our tribal citizens with the best possible benefits and amenities.

With operations based in Miami Oklahoma, the organization serves its tribal citizens and is focused on maintaining transparency, accountability, and financial integrity in all its activities.

03.

SCOPE OF WORK



The selected accounting service provider will be responsible for delivering comprehensive financial and accounting services. These services must comply with relevant financial regulations, support organizational goals, and provide transparency and accuracy in all reporting activities.

The scope includes, but is not limited to:

- Financial Management and Reporting
- Audit Prep Support
- Journal Entry Review
- Staff Support
- Communication and Collaboration

a. DELIVERABLES



Financial Management

Trial balance and general ledger reconciliations and adjustments.




Audit Prep Support


Timely preparation and submission of required FY25 and FY26 audits.

B.

TIMELINE



CONTRACT START DATE	Date 5/20/2026
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INITIAL REVIEW & ONBOARDING	Date 5/20/2026
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C.

DURATION OF SERVICES

The accounting services contract will be valid for the entirety of the audit preparation and audit submission, starting from the date of agreement signing.

The contract may be extended based on performance and mutual agreement.

04.



VENDORS QUALIFICATION

Vendors must meet the following minimum requirements:

- ➔ Valid professional certification (e.g., CPA or local equivalent).
- ➔ Minimum 5 years of high-level accounting experience.
- ➔ Proven track record with at least two similar engagements.
- ➔ Familiarity with accounting standards such as GAS/FASB/GASB/AICPA.

05.

PROPOSED APPROACH

Bidders are required to prepare this section in detail and attach it as a separate document along with their proposal submission.

a. WORK PLAN & METHODOLOGY

Vendors should outline their complete approach to delivering the requested accounting services. This includes proposed phases, processes, timelines, tools, and quality control methods. Please clearly describe how the work will be planned, managed, and reported.

b. TEAM BIOS / EXPERTISE

Include concise bios for each team member involved in the project, particularly those with professional qualifications (e.g., CPA, ACCA). Highlight relevant experience and past success in similar roles.

c. PROJECT TEAM & ROLES

List the key personnel who will be assigned to this engagement. Define each person's role, responsibilities, and how they contribute to successful service delivery.



06.



PRE-SUBMISSION QUESTIONS

Vendors may submit questions or requests for clarification regarding this RFP prior to the submission deadline. All inquiries must be sent in writing to the contact person listed in the "Contact Information" section by 12 p.m. CST on May 13th, 2026.

Responses to all received questions will be compiled and shared with all interested vendors to ensure a fair and transparent process.

07.

EVALUATION CRITERIA

RFP COMPLIANCE

Clear, complete, and fully compliant with RFP guidelines.

05%

COMPANY INFORMATION

Overview of organization, capabilities, and team skills.

05%

CRITERIA XYZ

Additional criteria as needed

90%

TOTAL SCORE

100%

08.

BUDGET & PRICING



Vendors are required to provide detailed pricing in accordance with their submission.

The pricing should include a clear cost breakdown for all proposed services and must cover:

- ➔ Professional service fees.
- ➔ Any applicable taxes or charges.
- ➔ Optional/additional services (if any).

All pricing must be quoted in USD and remain valid for a minimum of 60 days from the submission deadline.

09.

SUBMISSION REQUIREMENT & DEADLINE

All proposals must be submitted by 12 p.m. CST on May 15th, 2026.

Vendors must ensure the following when submitting proposals:

- ➔ Submit in PDF format via email to: bamos@peoriatribe.com and lmason@peoriatribe.com.
- ➔ Subject line should read: "Proposal Submission – Accounting RFP".
- ➔ Late submissions will not be considered.

Proposals should include all required documents and adhere to the structure outlined in this RFP.



TERMS & CONDITIONS

1 LEGAL DISCLAIMER

This RFP does not obligate the Peoria Tribe of Indians of Oklahoma to award a contract or to reimburse any costs incurred in preparing or submitting a proposal. We reserve the right to accept or reject any or all proposals, to negotiate with any vendor, or to cancel or amend the RFP at any stage.

2 CONTRACT TERMS

The successful vendor will be required to enter a formal contract, detailing scope, timelines, deliverables, payment terms, and other conditions.

3 RIGHTS RESERVED

We reserve the right to:

- ➔ Modify or withdraw this RFP at any time.
- ➔ Request additional information from vendors.
- ➔ Negotiate terms and scope before final selection.
- ➔ Disqualify proposals not adhering to instructions or timelines.

4 CONFIDENTIALITY

All proposal content and related communication must be treated as confidential. No information may be disclosed to third parties without written permission. Submitted proposals become the property of Peoria Tribe of Indians of Oklahoma.

5 COSTS INCURRED

All costs associated with the preparation and submission of proposals shall be borne solely by the vendor.

6 MODIFICATION OR WITHDRAWAL OF PROPOSALS

Vendors may revise or withdraw their proposal prior to the submission deadline by providing written notice. No modifications will be accepted after the deadline unless requested.

APPENDICES

APPENDIX A:

1. Financial Management and Reporting:

- a. Perform a trial balance assessment to identify significant balance sheet accounts that have been reconciled.
- b. Prepare reconciliations of agreed-upon significant accounts and provide documents for approval and journal entries for posting.
- c. Review source documents to assist in the preparation of general ledger account reconciliations and reconcile audit beginning balances to our tribal balance and ensure all audit adjustments are posted.
- d. Collaborate with our external auditors to provide them with adjusted trial balances, general ledgers, supporting general ledger account reconciliations and related documents.

2. Journal Entry Review:

- a. Review more complex journal entries for accuracy, appropriate documentation, and compliance with policies.
- b. Recommend adjusting journal entries as needed during year-end close for the finance director's approval.

3. Staff Support:

- a. Provide limited support and guidance to finance and accounting staff as needed to assist with their production of PBC and financial information for the auditors.

4. Communication and Collaboration:

- a. Attend regular meetings with leadership, finance committees, and boards to present updates, as needed.
- b. Serve as a main point of contact for external auditors.

APPENDIX B:

- Begin financial management and report upon execution of contract.
- Conduct journal entry review as necessary.
- Provide staff support through the duration of the contract period.
- Communicate and collaborate with appropriate contacts as necessary.
- Financial statements must be ready to be submitted to the external auditor within 60-75 days after contract is completed.
- Continue as the main point of contact for external auditors until the audit is submitted into the clearing house.
- Provide any necessary audit adjustment entries to our finance team after the audit is completed and provide support after those entries for questions, corrections, reversals, or additional information.