

# Request for Proposals

## Service Contract – Comptroller

### 1. Introduction

The College of Physiotherapists of Ontario is currently seeking proposals for the services of an independent finance expert to provide expertise as the College Comptroller. The Comptroller must be results-driven and detail-oriented with strong oral, listening, and critical thinking skills.

The Comptroller's primary liaison at the College will be the Registrar.

Submissions must be received by **December 28, 2018**.

### 2. Overview of the College's Mandate

The College regulates physiotherapists and exists to serve the public interest. The College protects the rights of patients to safe, competent and ethical care by ensuring physiotherapists maintain professional standards of practice and are held accountable for their conduct and practice.


### 3. Required Services

The Comptroller will provide expert knowledge and support on all aspects of finance, accounting and internal control policies and strategies to the Registrar, the Finance Committee and the Council (Board of Directors).

This includes but is not limited to the development and monitoring of annual capital and operating budgets, budget planning and forecasts preparation. The Comptroller will ensure the integrity of all financial accounting, complete regulatory and financial reporting, assist with accounting and investment policy development and provide advice related to the financial viability of the College. The Comptroller will also identify areas of financial risk and provide strategies related to risk mitigation and management.

### 4. Expected Deliverables

- Reviews and verifies the accounting functions and financial reporting activities performed by the Accounting Coordinator
- Develops an annual College budget and assists with the preparation of all financial statements/reports for internal and external stakeholders
- Develops and maintains policies for financial controls
- Ensures adherence to appropriate financial controls
- Oversees the financial records of the College including accounts payables and receivables, expense claims, bank statement reconciliations, profit and loss statements, and balance sheets
- Prepares regulatory report as required, which includes the management and compliance with local, provincial, and federal government corporate reporting requirements and tax filings



College of Physiotherapists of Ontario  
375 University Avenue, Suite 800  
Toronto, Ontario M5G 2J5

tel: 416-591-3828  
toll Free: 1-800-583-5885  
Fax: 416-591-3834  
info@collegept.org

[www.collegept.org](http://www.collegept.org)



**College of Physiotherapists of Ontario**  
375 University Avenue, Suite 800  
Toronto, Ontario M5G 2J5

tel: 416-591-3828  
toll Free: 1-800-583-5885  
Fax: 416-591-3834  
info@collegept.org

[www.collegept.org](http://www.collegept.org)

- Completes quarterly and fiscal year end closing processes and associated reports
- Develops business processes and accounting policies to ensure best practices as it relates to internal controls
- Prepares for and supports meetings of the Finance Committee and Council as it relates to the finances of the College
- Assists staff with budget forecasting and preparation, scheduling expenditures, analyzing variances and providing advice on corrective actions
- Participates in and supports the annual external audit process
- Works with the external auditors and external legal advisors to ensure the accuracy and reliability of annual financial reports

## 5. Consultant Selection Criteria

### Education

- Degree in Accounting or Finance
- An accounting designation
- Relevant experience in a not-for-profit or membership-based organization are desirable

### Experience

- Proven working experience as a Comptroller
- Minimum 5 years of overall combined accounting and finance experience

### Specialized Knowledge

- Thorough knowledge of accounting principles and procedures
- Experience with creating financial statements
- Experience with general ledger functions and the quarterly-end and year-end close process
- Advanced computer skills including use of databases and spreadsheets.
- Demonstrated knowledge of Microsoft Office Suite and QuickBooks.

### Skills and Abilities

- Highly business process oriented
- Excellent oral and written communication skills
- Demonstrated analytical skills and project management skills
- Ability to compose detailed reports or briefing notes

## 6. Anticipated Obligations Regarding Time

- Approximately 8 days per month (combination of in person and remote work).
- Attendance at internal organizational budget meetings (approximately 12-16 hours, December-February)
- Attendance at Finance Committee Meetings (typically four per year, one full day in person, three 1-2-hour teleconferences)
- Attendance at Council meetings in person at the College offices (1 day per quarter)



## 7. Correspondence and Questions

Any correspondence or questions about this RFP should be emailed to Rod Hamilton, the Registrar, at [rhamilton@collegept.org](mailto:rhamilton@collegept.org).

## 8. Proposal Format and Contents

All proposals must be submitted in electronic format to Maria Ramirez, HR Specialist, at [hr@collegept.org](mailto:hr@collegept.org).

Title of the email should contain ***"Comptroller"***.

To be considered as the provider for this service contract, proposals should include the following information:

- Your proposal including the anticipated time spent performing the activities and the associated costs. Costing may be described on the basis of hourly or daily rates or on a contract rate but must be included.
- A resume outlining your experience and qualification for the role
- A letter explaining your interest and your proposal

## 9. RFP Schedule and Proposal Deadline

The College reserves the right to amend this schedule at its discretion.

<b>Event</b>	<b>Date and Time</b>
• RFP issued	Friday, November 23, 2018
• Deadline for receipt of questions	Friday, December 21, 2018
• Deadline to submit RFP's	Friday, December 28, 2018

Proposals from both individuals and firms are welcome.

We thank everyone who submits proposals. However, only those who submit proposals that lead to selection for an interview will be contacted.

No phone calls or agencies, please.

College of Physiotherapists of Ontario  
375 University Avenue, Suite 800  
Toronto, Ontario M5G 2J5

tel: 416-591-3828  
toll Free: 1-800-583-5885  
Fax: 416-591-3834  
[info@collegept.org](mailto:info@collegept.org)

[www.collegept.org](http://www.collegept.org)