

January 2020

RFP for Bookkeeping and Payroll Services

Organization Background

Family, Career and Community Leaders of America (FCCLA) is a nonprofit national career and technical student organization for young men and women in Family and Consumer Sciences education in public and private school through grade 12. As a separate nonprofit entity, Montana Family, Career and Community Leaders of America (MT FCCLA) is a dynamic and effective student organization that helps young men and women become leaders and address important personal, family, work and societal issues through family and consumer sciences education. Chapter projects focus on a variety of youth concerns, including teen pregnancy, parenting, family relationships, substance abuse, peer pressure, environment, nutrition and fitness, teen violence and career exploration. Involvement in MT FCCLA offers members the opportunity to expand their leadership potential and develop skills for life – planning, goal setting, problem solving, decision-making and interpersonal communication – necessary in the home and workplace. MT FCCLA has approximately 70 chapters throughout Montana with over 1,000 members. MT FCCLA is based in the Bozeman area.

The mission of Montana FCCLA is to promote personal growth and leadership development through Family and Consumer Sciences education. Focusing on the multiple roles of family member, wage earner and community leader, members develop skills for life through: character development, creative and critical thinking, interpersonal communication, practical knowledge, and career preparation.

Contract Description

MT FCCLA contracts bookkeeping and payroll services to manage all financial transactions for the organization. MT FCCLA receives revenue from grant funding, membership dues, and donations, and accrues expenses throughout the year. In the months leading up to large events or conferences, there is an increase in financial transactions. It is the expectation that the contractor providing these financial services process transactions and reports in a timely manner.

Contract Requirements

It is imperative the contractor has a comprehensive understanding of the bookkeeping and accounting needs of a nonprofit organization. MT FCCLA requires the contractor to provide the following:

- Reconciliation of monthly financial reports
- Management of incoming revenue through existing bank accounts
- Payment for invoices, credit cards, applicable reimbursements, etc.
- Processing of payroll for employees of the organization; one employee currently on staff

- Completion and submission of appropriate IRS documents on behalf of the organization
- Utilization of predetermined codes to manage all forms of revenue and expenses
- Facilitation of a financial review annually
- Distribution of financial reports to designated persons as requested
- Communication and coordination with the organization's staff

Estimated Contract Duration

An annual contract will be drafted to determine the scope and cost of requested services.
Requested start date of July 1.

Proposal

Interested contractors must submit a proposal narrative by March 1, 2020 via email to director@mtfccla.org containing the following information:

- A brief description of the business including general history and a summary of contracts held similar in nature to the services described in this document.
- A listing of staff proposed to provide the indicated services and a summary of their qualifications.
- A detailed description of the proposed approach for implementing all of the contract requirements.
- A detailed summary report detailing the costs associated with all of the contract requirements.

Pricing Structure

MT FCCLA will compensate the contractor as agreed via contract after the approval of a proposal. Proof of workers' compensation insurance or a certificate of exemption must be provided at the time of contract signing. The contractor will provide the necessary office space, office equipment, office supplies, software, utilities, and storage necessary to provide services.

Additional Information

The organization has monthly transactions, but it varies depending on the annual calendar and programming. The programming year focuses on two larger events – the Leadership Rally (every fall, 2-3 days, up to 300 attendees, often held at Fairmont Hot Springs) and the State Leadership Conference (every March, 3 days, up to 700 attendees, held at MSU-Bozeman). A slow month might be as little as 10 transactions; a busy month may be as many as 50 transactions.

Questions

Direct all questions and inquiries to State Director, Whitney Whittecar, at director@mtfccla.org.