



REQUEST FOR PROPOSAL (RFP) FOR ACCOUNTING/BOOKKEEPING SERVICES

Big Brothers Big Sisters of the Big Bend, Inc (BBBS BB) invites individual financial professionals and firms to submit a proposal for contracted accounting and bookkeeping services.

Proposal documents must be submitted in PDF format via email to molly@bbbsbigbend.org and cc: officemanager@bbbsbigbend.org by April 10, 2026 @ 5pm. All candidates/vendors will be informed of a decision no later than Friday April 24th @ 5pm. Individuals or vendors must be available for a transition meeting with the current firm.

Send proposals to: Molly Lord, CEO
Big Brothers Big Sisters of the Big Bend, Inc
molly@bbbsbigbend.org
and cc: officemanager@bbbsbigbend.org
Subject Line: Accounting

Contact Information for Questions Diane Dawson, Director of Operations
Big Brothers Big Sisters of the Big Bend, Inc
565 E. Tennessee Street
Tallahassee, FL 32308
officemanager@bbbsbigbend.org
(850-386-6002)

ORGANIZATIONAL OVERVIEW

Big Brothers Big Sisters of the Big Bend, Inc is a 501(c)(3) public charity, that is committed to our mission of providing children facing adversity with strong and enduring, professionally supported one-to-one relationships that change their lives for the better, forever. Our agency has beneficial interest in assets held by Community Foundation of North Florida, Inc, and a 5500 plan, as well as both state and federal grants. Our annual revenues are just under 1 million dollars per year, and the agency employs between 7 – 10 full time staff, as well as temporary employees. The organization is match-based, big/mentors and littles/mentees. The organization has a June 30th fiscal year-end.

SUMMARY OF REQUEST

BBBS BB is currently accepting proposals for accounting/bookkeeping services. The purpose of this Request for Proposal (RFP) is to solicit proposals from various financial professional and firms, conduct a fair and extensive evaluation based on criteria listed herein, and to select the vendor that best meets the immediate and ongoing needs of the organization.

SCOPE OF WORK

BBBS BB seeks to contract with an independent financial professional or firm to provide accounting/bookkeeping services to our organization in the area of: 1) monthly reconciliation of bank accounts, credit card account and petty cash account and verify monthly payroll expenses against payroll reports and checking accounts 2) process and file quarterly 941, file and pay quarterly RT-6, file annual form W3 & W2, 3) process and file annual Form 1096 and 1099s. Respond to requests for advise/information from management. BBBS BB currently uses Quickbooks Online and Quickbooks Online Payroll Core.

EVALUATION CRITERIA

BBBS BB will consider the following factors when evaluating the proposals. Factors are not listed in order of importance.

- Qualifications of firm/independent financial professional
- Qualifications and experience of the staff to be assigned to our account
- Ability to meet the Scope of Work
- Ability to maintain staff continuity as much as possible
- Cost of services
- Services beyond the Scope of Work
- References

MINIMUM QUALIFICATIONS

Qualified vendors must possess the following knowledge, skills and experience:

- Thorough understanding of accounting principles, procedures and practices including but not limited to: GAAP
- Demonstrated experience with non-profit accounting
- Demonstrated ability to perform the above scope of work in a timely, efficient, and competent manner to ensure the continuity of work.

PROPOSAL REQUIREMENTS

GENERAL INFORMATION

Please include a cover sheet with the following information:

- Name of contractor/firm
- Contact person/Title
- Mailing address
- Telephone number
- Email address
- Website

We will provide financial statements and our most recent form 990 upon request.

ORGANIZATIONAL OVERVIEW AND QUALIFICATIONS

In 500 words or less, please provide the following descriptions:

- Firm/professional history and scope of practice of firm.
 - o Brief synopsis of professional experience
 - o Any related professional designations and how they will directly benefit the work for our organization.
 - o Organizations they serve as a volunteer or board member, including years of service.
 - o Any personal relevance or meaning to our organization's mission
- Explain how contractor/firm is a good fit with our organization, detailing experience with other non-profit clients of a similar size and scope.
- Provide details on staff turnover in the past three years, and commitment to continuity.

STATEMENT OF WORK AND TIMELINE

In 1000 words or less, please provide the following descriptions:

- Proposal to fulfill the Scope of Work as noted above.
- Outline key steps and persons responsible, level of effort, and supervision required.
- Your preferences and expectations when working with clients.
- Describe how your firm will approach the transition process, if we move from our current firm. Please include how we will transition licenses for QuickBooks.
- Based on our Financial Statements and Form 990 and your firm's experience in the nonprofit sector, provide three suggestions you would make to BBBS BB as our accounting/bookkeeping firm.

PROJECT MANAGEMENT AND FEES

Please describe the following:

- Set forth your fee proposal for the included services, with whatever guarantees can be given regarding increases in the future years.
- Provide your proposed fee for the regular monthly scope of work, as well as the required quarterly and annual work.

REFERENCES

Please provide the following:

- A list of non-profit clients (name only) for whom the contractor/firm has provided similar contracted services.
- Contact information for three (3) specific professional references including at least two (2) current non-profit clients, for whom the contractor/firm provided similar services.

ADDITIONAL TERMS

During the evaluation process, BBBS BB reserves the right to request additional information or clarifications from proposers and the right to reject any or all proposals. The cost of developing proposals is entirely the responsibility of the individual or vendor and shall not be charged in any manner to BBBS BB. This includes, but is not limited to, the direct cost of vendor personnel assigned to prepare vendor's response to the RFP and any out-of-pocket expense (including, but not limited to travel accommodation, supplies, etc.) incurred by the individual or vendor in preparing the response to the proposal. Please note that all materials submitted in response to this RFP become the property of BBBS BB upon delivery and shall be appended to any formal documentation, which would further define or expand the contractual relationship between BBBS BB and the contracted vendor. Each applicant, as an express condition for the BBBS BB consideration of such proposal, agrees that the contents of every other proposal submitted by other applicants with respect to this RFP are confidential, proprietary and trade secret information in all technical ears, and waives any right to access such proposals during the RFP process. No submissions or supporting documentation will be returned to the submitting applicant. Neither party shall be liable for disclosures that are required by law.