



## Scope of Work

**Title:** Tax Preparation Company

**Works With:** AFP Board of Directors of Greater Houston Chapter

In 2018, the Association of Fundraising Professionals – Greater Houston Chapter (AFP-GHC) leadership introduced and implemented a new five-year Strategic Plan focused on significant, dynamic growth, including leadership development, added educational programming, and enhanced member benefits to ensure increased member participation. Historically, the chapter has sought administrative management services by contracting with a specific association management company. After much research, examination, and discussion with numerous and varied key stakeholders, the chapter leadership has decided to move forward with Goal 7 of the chapter’s five-year Strategic Plan. That is, by 2022, AFP-Greater Houston Chapter will have an organizational leadership and volunteer management model that can readily support the expansive membership and programming of the Chapter.

In accordance with our Policies and Procedures, the chapter puts out a Tax Filing and 990 Preparation RFP every five years. This scope of work outlines that RFP for the 2020 year as it relates to our 2019 financials.

Our chapter requests a bid from your firm to provide:

- Preparation of IRS Form 990 and applicable state form for the year 2019. Required state filings will be in Texas.
- Planning meetings in preparation for filing IRS Form 990.
- Availability to answer questions throughout the entire year.

Please provide the following information in your proposal. Since we will be comparing the qualifications of different firms, please provide the information in the order requested. That includes a description of:

- Your firm and the level of experience of the individuals who would be assigned to our account. (Ex: staff size, number of professionals, industries served, etc.)
- The engagements your firm currently conducts in the not-for-profit sector.
  - Please describe all relevant experience in the non-profit sector and where possible, include comparable non-profit clients.
- Your firm’s basic approach to the preparation of IRS Form 990 and tax filing, as well as the resulting advantages that will accrue to our organization. Include description of the activities undertaken by your firm to promote/ensure audit quality.
- The extent to which our organization’s personnel will be expected to contribute to the work effort.
- Any existing or potential relationships between your firm and our organization and any employee or officer of the organization that could affect your independence and objectivity because of an actual or perceived conflict of interest.
- The engagement team which would be preparing and filing our Form 990 and include a resume of the qualifications and experience for partners, managers and staff.

- The expected timing and completion of the Form 990.
- Your preparation fees, including the estimated number of hours to be spent by each person and the expected rate per hour of each.
  - Be sure to include out-of-pocket expenses in your fee structure and indicate how these are calculated.
- How and if you bill for overruns, as well as how you manage against overruns so we can be assured of no “surprise” billings.

Our chapter will be ready for the preparation of our Form 990 for fiscal year 2019 to begin in June of 2020. We expect the filing to occur by the close of summer 2020.

Proposers are expected to examine the specifications and all instructions contained in this invitation for bids. The proposals must be signed by a duly authorized representative. Consideration may be given to such matters as contractor integrity, record of past performance, and financial and technical resources. Upon request, bidders must be willing to provide information concerning these matters.

If you are interested in submitting a proposal, please contact Jillian Day at [afpghciwd2015@gmail.com](mailto:afpghciwd2015@gmail.com) by Friday, January 31<sup>st</sup>, 2020 and we will make available to you:

- current financial statements
- latest tax returns
- an organizational chart
- other documents as requested by you for preparation of a proposal

No proposals received after this date will be considered. All proposal submissions will be responded to once a decision has been made.

### **Contract Terms**

Provisions of this RFP and the contents of the successful proposal are considered available for establishment of final contractual obligations for a minimum period of 60 days following the proposal submission. The contract resulting from this RFP will commence as of the date of execution of the contract. The length of the contract will be negotiated by AFP-GHC and the selected firm. AFP-GHC will pay the vendor based on the arrangement agreed upon. At least thirty (30) days prior written notice must be given to AFP-GHC in the event coverage is materially changed, cancelled or non-renewed.

## About AFP-Greater Houston Chapter

### Mission Statement

Association of Fundraising Professionals (AFP), an association of professionals throughout the world, advances philanthropy by enabling people and organizations to practice effective and ethical fundraising. The core activities through which AFP fulfills this mission include education, training, mentoring, research, credentialing, and advocacy.

### Vision

By 2022, AFP – Greater Houston Chapter will elevate the fundraising profession, inspire exceptional fundraisers, and advance philanthropic giving.

### Core Values

The Association of Fundraising Professionals – Greater Houston Chapter (AFP GHC) Strategic Plan lays out six core values:

- **Professionalism** – The role of fundraising professionals is an essential, noble pursuit and advances the greater Houston nonprofit community.
- **Learning / education** – The assurance of relevant and high quality educational opportunities for fundraising professionals at all career points and in all staff roles.
- **Ethical fundraising** – Universal adherence to the AFP Code of Ethical Principles and Standards, and assuring that fundraising professionals are informed of ethical fundraising practices and the tenets of the Donor Bill of Rights.
- **Integrity** – Transparency in the management of chapter finances and governance.
- **Fun** – An environment of camaraderie and building bonds between fellow fundraising professionals.
- **Inclusiveness** – Welcoming all fundraising professionals, regardless of employment status, organizational size, or professional position, and encouraging all to become active participants in the chapter.

### Chapter History

The Association of Fundraising Professionals (AFP) represents more than 30,000 members in 230 chapters throughout the world, working to advance philanthropy through advocacy, research, education and certification programs. The association fosters development and growth of fundraising professionals and promotes high ethical standards in the fundraising profession. The Greater Houston Chapter was formed in 1969 and boasts a growing membership of more than 600 fundraising professionals making it the seventh largest chapter in the world.

### Board Composition

The AFP GHC Board of Directors is made up of 20 to 30 fund development professionals who volunteer their time and resources to the chapter and to board service. Directors are elected by Chapter membership and serve a minimum of a one-year term. The President Elect, President, and Past President commit three years to board service to ensure streamlined leadership. Committee Chairs are asked to identify and recruit his/her replacement, resulting in a two-year commitment to committee leadership. The Executive Committee is comprised of the President Elect, President, Past President, Secretary, and Treasurer.