The Helminthological Society of Washington

Request for Proposals
Bookkeeping/QuickBooks set up and tax preparation services

Invitation
The Helminthological Society of Washington (HSW) is seeking a firm with experience in non-profit bookkeeping and accounting for bookkeeping (QuickBooks software set up) and tax preparation services. Qualified firms or individual contractors are invited to submit proposals, which will be accepted until August 21, 2020 at 5 p.m. EDT. Questions and completed proposals should be submitted electronically to Ashleigh Smythe, Corresponding Secretary-Treasurer, at smytheab@vmi.edu.

RFP schedule

<table>
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<tr>
<th>Activity</th>
<th>Date</th>
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<tr>
<td>RFP available/distributed</td>
<td>July 6, 2020</td>
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<tr>
<td>Deadline for RFP electronic submission</td>
<td>August 21, 2020</td>
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<tr>
<td>Selection of firm</td>
<td>By August 28, 2020</td>
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<tr>
<td>Partnership effective date</td>
<td>September 1, 2020</td>
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<td>Partnership completion date</td>
<td>Approximately March 31, 2021</td>
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Note: The issuing of this RFP in no way obligates HSW to accept any of the proposals submitted by the due date, and HSW may, at its sole discretion, continue to operate under the status quo.

Background
The Helminthological Society of Washington (HSW), the prototype scientific organization for parasitological research in North America, was founded in 1910 by a devoted group of parasitologists in Washington, D.C. It is a 501(c)(3) non-profit organization incorporated in the state of Maryland. Forging a niche in national and international parasitology over the past century, the Society focuses on comparative research, emphasizing taxonomy, systematics, ecology, biogeography and faunal survey inventory within a morphological and molecular foundation. Through its two meetings in the Washington, D.C. area annually, and via publication of the peer-reviewed journal *Comparative Parasitology*, the Society actively supports and builds recognition for modern parasitological teaching and research.

Scope of work to be performed
Currently, the HSW corresponding secretary-treasurer (CST, a volunteer position) uses an excel spreadsheet to track revenue and expenses in a single checking account and assets in a Vanguard brokerage account. HSW has no paid employees. Due to the increasing complexity of HSW finances and investments, we are seeking assistance in setting up QuickBooks software to allow the CST to more easily track revenue, expenses, and assets on a monthly basis and to facilitate tax preparation by the chosen firm or individual. Specifically, we request a firm or individual to:

- Work with CST to set up a complete QuickBooks software system (purchased by HSW) to allow CST to conduct monthly reconciliation of all bank and investment accounts. This will include help in determining which version of QuickBooks is best for HSW, system design and implementation, and set up of customized settings and reports;
• Provide trouble shooting assistance through March 31, 2021 to CST on use of QuickBooks system for HSW finances;
• Prepare federal 990ez forms and associated schedules for the 2020 tax year, with filing by March 31, 2021.

Proposal requirements
The following must be received by the proposal due date:
• Section 1: Proposer/firm information – name, primary contact, email, phone;
• Section 2: Firm’s qualifications – provide evidence of experience with bookkeeping, QuickBooks software, and specifically bookkeeping for non-profit organizations;
• Section 3: Fees – provide a project price for all requested services, with details on each service (QuickBooks set up/assistance and tax preparation). Any adjustments, additional expenditures, or other service outside the scope of this proposal must be pre-approved;
• Section 4: Attachments:
  o Resumes for key personnel working on this project
  o Professional references: At least 3 references for which firm has performed similar work, including current contact information

Selection process
Proposals will be reviewed for completeness, firm or individual experience, experience with previous similar work, and reasonableness of cost. Interviews may be conducted with select proposers.

Award/ term
HSW has the right to decline to engage in a proposed partnership or any part thereof for any reason. However, if awarded, the term of the agreement will be for approximately eight (8) months, beginning in September 2020 and ending with the completion of federal tax forms by March 31, 2021. Contract may be renewable depending on the needs of the Society.