



REQUEST FOR PROPOSAL FOR BOOKKEEPING/ACCOUNTING SERVICES

Summary of Request

The Retired Teachers Organization (RTO) has initiated a Request for Proposal (RFP) process for contracted bookkeeping, accounting and financial services for the RTO and the Retired Teachers' Legacy Foundation. All applicants must have relevant non-profit experience, a long-term interest in working with the RTO and demonstrate an interest in working with seniors, in particular, retired educators.

Background

The Retired Teachers Organization is the official body representing the retired teachers of Nova Scotia. The RTO advances, promotes and protects the welfare of over 7,500 members. Formed in 1966, the Retired Teachers Organization acts as a watchdog on all issues that may impact retired teachers in the province. The RTO represents Nova Scotia as a member of the Canadian Association of Retired Teachers and administers the Retired Teachers' Legacy Foundation Fund.

The Retired Teachers' Legacy Foundation is a registered charity created to honour the life and work of Nova Scotia teachers. Through the use of "In Memory" cards, the Foundation accepts donations which are awarded to assist institutes defined as a society or organization founded for an educational, medical, social or similar purpose.

Scope of Work

- General day-to-day finances of the RTO and RTO Legacy Foundation
- Record financial transactions including deposits, expenses, accounts payable and accounts receivable
- Prepare financial reports including reconciliations
- Perform year end reports for both RTO and RTO Legacy Foundation
- Budget preparation for RTO
- Work with the Treasurer/Finance Committee
- Other duties as assigned

Term of Contract

Initial contract will be for one year with an option to extend the contract.

Cost Proposal

The service provider is requested to submit a project price, include each service and detailed fee schedule. Any adjustments, additional expenditures, or other services outside of the scope of this proposal must be pre-approved. Expenses will be paid for travel to required meetings.



Proposal Requirements

- ***Executive Summary***

Include an Executive Summary of no more than two pages that outlines the key components of your proposal.

- ***Overview***

Provide background information on your service that you determine is relevant or noteworthy.

- ***Qualifications/Experience***

Describe your experience with similar assignments and the value-add you brought to the client.

- a. Must have bookkeeping/accounting experience
- b. Must be familiar with accounting procedures and programs
- c. Must be bondable
- d. Must have own computer hardware; software to be negotiated
- e. Must have own workplace

- ***References***

Provide the names and contact details of three client references.

Selection Process

Proposals will be reviewed for completeness, experience, excellent references, and reasonableness of cost proposal. Interviews may be requested with select service providers.

Proposal Submission

Questions and completed proposals shall be submitted via email to Alyson Hillier, RTO President, alyson.hillier53@gmail.com

Completed proposals are due by 5:00pm AST on Monday, October 10th, 2022.



INTENT TO RESPOND

The service provider named below intends to submit a response to the Retired Teachers Organization's Request for Proposal for Bookkeeping/Accounting Services.

Name:

Address:

Contact Information:

Contact Name: _____

Contact Title: _____

Telephone Number: _____

Email: _____

Signature: _____

Date: _____

Intent to Respond Form is due no later than Friday, September 30th.

PLEASE NOTE: Submission of this form indicates the service provider's intent to respond; however, it does not obligate the service provider to respond.

Thank you for your time and consideration. Please feel free to contact me with questions.

Sincerely,

Alyson Hillier
President
Retired Teachers Organization