

Request for Proposals

Nonprofit Finance, Accounting, Compliance, and Fractional CFO Services

Northwest Native Chamber

I. Introduction

Northwest Native Chamber invites proposals from qualified firms or consultants to provide nonprofit finance, accounting, compliance, budgeting, reporting, and fractional CFO services.

NWNC seeks a provider, or combination of providers, with demonstrated experience supporting nonprofit organizations with restricted funding, grant accounting, annual budgeting, financial reporting, audit preparation, tax compliance, and accounting system optimization.

NWNC currently performs core finance functions internally, including bookkeeping, accounts payable, accounts receivable, and payroll. NWNC uses MIP as its accounting system and seeks support from providers with experience strengthening financial reporting, fund accounting, internal controls, annual budgeting, and management-level financial analysis within MIP or comparable nonprofit accounting systems.

NWNC may award one contract or multiple contracts depending on the qualifications, scope, and proposed structure of the responding vendors.

II. Scope of Services

Proposers may respond to one or more of the following service areas. NWNC reserves the right to select a provider for all services or to separate services across multiple providers.

A. Controller-Level Accounting Review

Services may include:

1. Monthly financial review and close support
2. Review of reconciliations, journal entries, fund accounting, and restricted funding activity

3. Support for accurate program, grant, and organizational reporting
4. Review of payroll allocation and cost allocation processes
5. Guidance on nonprofit accounting practices and internal controls
6. Support for MIP reporting, coding, and accounting structure improvements
7. Technical support and training for internal finance staff, as needed

B. Tax and Compliance Support

Services may include:

1. Preparation or review of annual nonprofit and payroll tax filings
2. Preparation or review of state charitable filings
3. Support for annual 1099 preparation or review
4. Tax and compliance calendar support
5. Guidance on nonprofit compliance matters within the scope of the engagement

C. Audit Readiness and Audit Support

Services may include:

1. Audit preparation planning
2. Support preparing audit schedules and documentation
3. Coordination with NWNC staff during the audit process
4. Review of recurring audit preparation needs
5. Recommendations to improve audit readiness and internal financial documentation

This RFP does not seek independent audit services unless separately requested by NWNC.

D. Fractional CFO Advisory, Annual Budgeting, Forecasting, and Board Reporting

Services may include:

1. Monthly or periodic financial advisory meetings with leadership
2. Preparation of quarterly financial reports
3. Preparation, review and interpretation of financial reports
4. Annual budgeting support, including budget calendar, assumptions, process support, and board-ready budget materials
5. Forecasting and scenario planning
6. Cash flow review and planning
7. Financial risk identification and recommendations
8. Board and Finance Committee reporting support
9. Support for organizational financial planning and decision-making

10. Support aligning budget development with staffing, program, grant, and administrative cost assumptions

E. MIP Reporting and System Optimization

NWNC has used MIP as its accounting system since 2022. NWNC is seeking providers with experience helping nonprofits use MIP effectively for financial reporting, fund accounting, grant tracking, payroll allocation review, audit support, budgeting, and management reporting.

Services may include:

1. Review of current reporting structure and accounting dimensions
2. Recommendations to improve financial, grant, budget, and board reporting
3. Support refining MIP reports and related workflows
4. Identification of process improvements to reduce manual work
5. MIP-related documentation and staff training, as needed

F. Finance Process and Capacity Building

Services may include:

1. Review of finance roles, workflows, and review points
2. Support developing finance calendars and recurring reporting timelines
3. Recommendations for internal controls appropriate for a nonprofit of NWNC's size and complexity
4. Support developing practical finance procedures and documentation
5. Recommendations for long-term internal and external finance capacity
6. Support developing or refining the annual budgeting process, including roles, timelines, templates, assumptions, and review points

III. Desired Provider Qualifications

Qualified providers should demonstrate:

1. Experience supporting nonprofit organizations of comparable size or complexity
2. Experience with restricted funds, grants, and nonprofit fund accounting
3. Experience with MIP or comparable nonprofit accounting systems
4. Experience with annual budgeting, forecasting, and board-level reporting
5. Experience with audit preparation and nonprofit tax compliance
6. Ability to work with internal staff who perform day-to-day finance functions
7. Clear communication and practical recommendations for leadership and governance audiences

8. Understanding of internal controls, confidentiality, and nonprofit financial management standards

IV. Proposal Requirements

Proposals should include the following:

1. Cover Letter

Briefly describe the proposer's interest, qualifications, and relevant experience.

2. Proposed Scope

Identify which service areas the proposer is responding to:

1. Controller-level accounting review
2. Tax and compliance support
3. Audit readiness and audit support
4. Fractional CFO advisory, annual budgeting, forecasting, and board reporting
5. MIP reporting and system optimization
6. Finance process and capacity building

3. Approach and Workplan

Describe the proposed approach, including anticipated timeline, communication cadence, and recommended first-phase priorities.

4. Staffing

Identify key personnel assigned to the engagement, including their roles, qualifications, and relevant nonprofit finance experience.

5. Relevant Experience

Describe experience with nonprofit finance, grants, restricted funds, MIP or comparable systems, audit support, tax compliance, annual budgeting, forecasting, and board reporting.

6. Pricing

Proposals must include pricing by service area, including:

1. Monthly retainer, hourly, or fixed-fee pricing, as applicable

2. Estimated level of effort by service area
3. Hourly rates by role for additional services
4. Services included and excluded from the proposed fee
5. Proposed not-to-exceed amount by service area, where applicable
6. Proposed total not-to-exceed amount for the contract term
7. Any assumptions that may affect pricing

Proposers are encouraged to separate recurring services from annual, project-based, or optional services.

7. References

Provide at least three references from nonprofit or mission-driven clients.

8. Conflicts and Independence

Disclose any actual or potential conflicts of interest. Proposers should also identify whether any proposed services may affect independence if the proposer or related firm provides audit services.

V. Budget and Contract Cap

NWNC expects the final agreement to include a defined scope of services and a total not-to-exceed contract amount. NWNC may also establish service-area caps for recurring, annual, or project-based work. Proposers should provide pricing that clearly identifies what is included, what is excluded, and the rate or approval process for any additional work. NWNC will not be responsible for payment for services performed outside the approved scope or contract cap unless the work is authorized in writing in advance.

VI. Anticipated Contract Structure

NWNC is open to a retainer, hourly, fixed-fee, or phased contract structure. NWNC may negotiate scope and pricing before final award. NWNC anticipates an initial contract term of up to twelve months, with the option to renew or modify the scope based on organizational need, performance, and available funding. NWNC reserves the right to award all, part, or none of the requested scope to a single provider or to multiple providers.

VII. Evaluation Criteria

Proposals will be evaluated based on the following criteria:

Evaluation Criteria	
Criteria	Weight
Nonprofit finance and accounting experience	20%
Experience with grants, restricted funds, and fund accounting	20%
MIP or comparable system experience	15%
CFO advisory, annual budgeting, forecasting, and board reporting experience	15%
Clarity and practicality of proposed approach	10%
Pricing transparency, proposed not-to-exceed structure, and value for scope	15%
Organizational fit and communication approach	5%

NWNC will consider the overall value of the proposal, including the clarity of the proposed scope, the reasonableness of pricing, the proposed not-to-exceed amount, the level of effort assigned to each service area, and the proposer's ability to distinguish between recurring services, annual deliverables, project-based work, and additional services requiring prior written approval.

VIII. Submission Instructions

Proposals must be submitted electronically to:

Leslie Davidson
Operations Manager
Northwest Native Chamber
Contracts@NWNC.org

Subject line: **Finance Services RFP Proposal – [Vendor Name]**

Proposals are due by **August 14, 2026**

IX. Questions

Questions regarding this RFP must be submitted in writing to:

Leslie Davidson, Contracts@NWNC.org

NWNC may share responses to questions with all known prospective proposers to ensure a fair and consistent process.

X. Reservation of Rights

NWNC reserves the right to:

1. Accept or reject any or all proposals
2. Award one or multiple contracts
3. Negotiate scope, pricing, and terms before award
4. Request additional information from proposers
5. Modify or cancel this RFP
6. Select the proposal that best meets NWNC's needs, which may not be the lowest-cost proposal

Optional Pricing Table for Proposal Submission

Service Area	Proposed Fee	Pricing Type	Estimated Hours	Additional Hourly Rate	Proposed Cap
Controller-level accounting review		Monthly / Hourly / Fixed			
Tax and compliance support					
Audit readiness and audit support					
Fractional CFO advisory and board reporting					

Optional Pricing Table for Proposal Submission

Annual budgeting support					
MIP reporting and system optimization					
Finance process and capacity building					
Other proposed services					
Total proposed not-to-exceed amount					

Optional: Vendor Response Questions

Proposers may respond briefly to the following questions:

1. How would you structure the first 90 days of work with NWNC?
2. What finance functions do you typically recommend remain internal versus externally supported for nonprofits of comparable size?
3. How do you support organizations that perform bookkeeping, AP, AR, and payroll internally but need external review and higher-level advisory support?
4. What is your experience using MIP for nonprofit fund accounting, grant reporting, budgeting, and board-level reporting?
5. How do you support annual budgeting and forecasting for organizations with restricted and unrestricted funding?
6. How do you support audit readiness without impairing audit independence?
7. How do you structure retainers, project fees, service-area caps, and not-to-exceed amounts?
8. What information would you need from NWNC to finalize scope and pricing?