



Request for Proposal

Professional Accounting & Advisory Services for Nonprofit

Organizational Overview

Houston Volunteer Lawyers (HVL) is the non-profit service arm of the Houston Bar Association. HVL provides free civil legal aid to low-income Houstonians through legal advice clinics that target and serve different populations (e.g., the general public, U.S. Veterans, the Chinese and Vietnamese communities, persons with HIV/AIDS). HVL has a screening process for extended representation services through which applicants are connected with a pro bono lawyer in private practice for the life of their legal problem. In 2018, HVL provided in-person, one-on-one legal advice to over 6,526 applicants at no charge, over 2,400 of whom were United States Veterans. 891 of their matters were referred to pro bono lawyers for long-term representation. In addition, Houston Volunteer Lawyers assisted 9,896 self-represented litigants with its Self-Help Program in 2018. Overall, volunteer attorneys donated 19,837 hours in legal services through Houston Volunteer Lawyers in 2018. At a rate of \$260 per hour, the time donated by Houston Volunteer Lawyers volunteers represents a benefit to low-income persons in 2018 of \$5,157,649.

Project Description

In the current year, HVL's operating budget is more than \$3.6 million. Our revenue consists of grants from government agencies, private foundations, and corporate and individual contributions and sponsorships. HVL's workforce is just under 40 employees, with salary and fringe benefits accounting for a large portion of our expenses. Cost allocations and grant reporting are a significant focus of our accounting and we are currently allocating costs for and reporting on fifteen (15) different grants. HVL uses QuickBooks Online for our bookkeeping and Bill.com for our payables processing.

HVL currently uses an outside accounting firm for much of the high-level reporting and accounting needs of the organization. HVL intends to move these responsibilities to the internal accountant and bring on an accounting assistant to handle payables, recordkeeping, and payroll preparation. As HVL reduces reliance on the existing outside accounting firm, we are opening this RFP to ensure that HVL is working with the most skilled and cost-effective firm for the work necessary.

HVL seeks to contract with a public accounting firm to perform the accounting and advisory functions described below for our 501(c)3 organization.

Monthly

- Prepared by Client (PBC) review of all reconciliations and workpapers prepared by HVL's internal accounting staff. The contracted firm would be expected to review for proper accounting methods including compliance with GAAP as well as propose accounting changes when needed.
- Preparation of monthly cash flow statement to be presented to the Executive Director and Board of Directors.
- Advisory services as needed (approximately 48 hours per year).

Annually

- Annual preparation of 1099 & 1096 filings
- Audit assistance, including assistance with financial statement disclosures (up to approximately 22 hours).

As Needed

- Ad hoc reporting.
- On-site meetings to discuss accounting matters with Staff Accountant & Executive Director.
- Availability by phone for any time-sensitive matters that may arise.

Qualifications

At a minimum, the selected vendor will possess the following knowledge, skills, and experience.

- Thorough understanding of accounting principles, procedures and practice, including, but not limited to:
 - GAAP
 - Texas Comptroller's Uniform Grant Management Standards (UGMS),
 - OMB Circulars and CFRs as they relate to non-profits and federal grant compliance
- Non-profit financial accounting, including, but not limited to:
 - Government and foundation grants management
 - Indirect cost allocations
 - Matching and reporting requirements
 - Government procurement standards

In addition, the contracted accountant will demonstrate the ability to:

- Perform the above scope of work in a timely, efficient and competent manner

- Be responsive to requests from HVL’s accounting staff, Executive Director, and Board of Directors
- Manage continuity of work and ensure reliable performance of deliverables

Proposals

Those wishing to submit proposals for this contract should carefully review this RFP and submit the following information:

General Information

- Name of contractor/firm
- Contact Person
- Title
- Mailing Address
- Telephone Number
- E-mail
- Website

Organizational Overview & Qualifications

- Describe the contractor/firm including its history and scope of practice
- Provide biographies of proposed team with resumes attached, including percentage of time each member of staff is expected to be working on this project

Qualifications

- Explain how the contractor/firm is a good fit with our organization, detailing experience with other non-profit clients of a similar size and scope
- More specifically, describe how contractor/firm meets the qualifications outlined above

Proposed Work Plan & Timeline

- Description of proposed process to fulfill the services and deliverables outlined in the above Project Description, including whether or not staff have experience with these services and deliverables, QuickBooks Online, and Bill.com
- Outline of persons responsible for each deliverable and level of effort in hours expected to complete each deliverable

Project Management & Fees

- Process for managing project, including how your firm will communicate with HVL regarding monthly timeline for deliverables or any questions or concerns that may arise while providing services

- Proposed budget necessary to fulfill the services and deliverables outlined in the above Project Description
- Budget narrative, justifications and methods of calculations, as well as hourly rates for the firm’s employees should additional services be requested outside of the Project Description

References

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

Questions Regarding RFP & Submission of Proposals

Questions Regarding RFP

Inquiries concerning this RFP should be submitted to sarah.kole@hvlp.org using the subject line “Accounting RFP Inquiry” by 5:00 PM on Friday, November 15th, 2019. Answers will be posted to <https://www.makejusticehappen.org/accounting-RFP> by 5:00 PM on Tuesday, November 19th, 2019.

Submission of Proposals

Proposals must be submitted in PDF format via e-mail to sarah.kole@hvlp.org by 5:00 PM on Friday, November 22nd, 2019.

Proposals will be reviewed at the end of November with interviews and follow-up occurring at the beginning of December, 2019. Proposed services would begin January 1, 2020. All candidates will be informed of a decision by December 31, 2019.

Additional Terms

All costs related to the submission of this RFP must be assumed by the submitting contractor/firm. No expenses will be reimbursed.

Proposing contractors/firms are asked to identify any conflicts of interest in serving HVL & to clarify, if applicable, how conflicts will be managed/mitigated to ensure the best interests of HVL are met.

This RFP does not commit HVL to award a contract, to pay any costs incurred in the preparation of the proposal to this request, or to contract for services. HVL reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with any qualified contractor or firm, or to cancel in part or in its entirety this RFP if, at the sole discretion of HVL, the organization determines that it is in its best interest to do so.