



REQUEST FOR PROPOSAL

**(RFP)**

FOR ACCOUNTING SERVICES FOR  
THE STUHR MUSEUM FOUNDATION

Due: May 31, 2025

I. THE STUHR MUSEUM FOUNDATION INTRODUCTION

The Stuhr Museum Foundation (SMF) is seeking proposals from accounting firms (herein referred to as “contractors”) to assist in the month-to-month accounting reconciliation, reporting and annual auditing for the Foundation. For purposes relating to this RFP, the value of the “pooled” funds of the Foundation is approximately \$12 million.

SMF was established in 1981 to raise unrestricted, special projects, and endowment funds on behalf of the Stuhr Museum of the Prairie Pioneer. SMF is a Nebraska incorporated nonprofit corporation, is exempt from federal income taxation as an organization described in section 501(c)(3) of the Internal Revenue Code and is governed by a board of trustees who represent a wide cross section of community leaders. SMF is located at 3133 W. Highway 34, Suite 2, Grand Island, NE 68801. More information may be obtained by contacting the Foundation at 308-385-5131.

II. FINANCIAL INFORMATION

SMF is responsible for investment of assets and obligations and its volunteer Finance Committee carries out these responsibilities. The board of trustees established Investment Policy for the purpose of investing the assets of its funds. The Finance Committee believes that by collectively investing these assets, the Foundation will have access to investment opportunities not otherwise available for each fund individually, thereby furthering the charitable purposes of the Foundation. Pursuant to the Investment Policy, approved by the Foundation’s board of trustees, the Finance Committee regularly examines all funds, establishes performance goals, identifies appropriate asset mix guidelines, reviews investment results, and selects, monitors and replaces professional investment managers.

V. ACCOUNTING

1. Accounting firm will electronically deliver all reports to SMF no later than the second (2<sup>nd</sup>) Monday of each month, unless prior arrangements have been made.

2. QuickBooks Online proficiency is necessary in order to provide the following monthly & annual procedures:

- a. Bank Reconciliation
- b. Bi-weekly Payroll & Quarterly Return Review
- c. QuickBooks Data Entry Review
- d. Monthly Report Presentation to Finance Committee
- e. Quarterly Investment Allocation and Management Fee Calculation from Pooled Investments
- f. Preparation of W-2’s and 1099’s
- g. Annual Budget Consultation & Collaboration
- h. Collaboration on Best Practices
- i. Financial Consulting & Reporting in Relation to Annual Audit
- j. Additional Consulting as Needed

### III. REQUESTED INFORMATION

The Stuhr Museum Foundation Finance/Executive Committee requests that all proposals for accounting services be for a period of five years to commence no later than July 1, 2025.

Contractors who are completing the process to serve as accounting partner of the Stuhr Museum Foundation should include the following information in a written proposal:

#### SECTION A – ORGANIZATIONAL PROFILE

1. Please provide the full name of your organization, address, telephone number and email address of your main office. Preference will be given to firms with an office and assigned manager located in Hall County.
2. Please identify the key contact person(s) for all inquiries and communications regarding the selection process and include a title, address, telephone and facsimile number and email address for each person.
3. Briefly describe your organization including, but not limited to, the year it was founded, its history, its ownership structure, and its primary focus.
4. Please indicate the number of years your firm has been performing accounting services similar to those that you seek to provide the Stuhr Museum Foundation.
5. Please disclose any and all conflicts of interest your organization has in serving as an accounting partner. Disclose whether your firm has any financial or other affiliation with other brokerage firms, banks, insurance companies, investment banking firms, or money management firms. If any such affiliations exist, how does your firm protect against conflict of interest.
6. Describe any material litigation, regulatory or legal proceedings in which your firm, or any of its principals, is or has been involved over the past five years.
7. Please note: The accounting service selected will be asked to provide copies of all appropriate state and/or national licenses required to act as an accounting partner.

#### SECTION B – CLIENT AND REFERENCE INFORMATION

1. Please describe your client base including types of clients served, the number of foundations or endowments for which your organization currently provides services, the length of time of services, and range of asset values among your clients.
2. Please provide three client references that most closely relate to SMF including the name, address, telephone number, title of the contact, and length of services.

#### SECTION D – REPORTING

1. List the personnel involved in providing monthly reports to SMF and describe the reporting process.
2. Please indicate the reporting capabilities of your firm to include electronic reports, custom capabilities, performance reports, online access and processing.

## SECTION E – FEES

1. Please describe the fees proposed by your organization for providing accounting services to SMF. This fee should be all-inclusive and include advisory services, asset reporting, and audit assistant. Please state very clearly what is included in your fee quotation.
2. Describe the frequency and timing of your fee arrangements.

## SECTION F – OTHER

1. Describe the ways in which your firm has supported or partnered with SMF in the past, if applicable.
2. How would your firm help us further develop and expand the assets of the Stuhr Museum Foundation and be good stewards of our donor gifts?
3. Describe your firm's commitment to and participation in the greater Hall County and Nebraska communities.
4. What do you believe sets your organization's services apart from the competition and what unique value-added services could your organization provide?

## REQUEST FOR PROPOSAL PROCESS

Please check all proposals prior to submitting for all required information.

One original and two copies of completed, sealed proposal packages are to be delivered to Bonnie Smith, Executive Director, 3133 W. US Highway 34, Suite 2, Grand Island, NE 68801. No faxes or e-mails will be accepted. **Proposal packages must be received by 4:00 PM on Friday, May 31, 2025.**

The Finance Committee will review proposals and accounting firm representatives may be invited to attend an interview at the Committee's discretion. The selection of the accounting partner will be announced no later than June 23<sup>rd</sup> with the engagement starting date to begin no later than July 1, 2025.