REQUEST FOR PROPOSAL

Financial Management, Bookkeeping, Payroll, Spend Management & Fractional CFO Services

Issued Jointly By:

Big Sky Chamber of Commerce

Visit Big Sky

RFP Issue Date	June 3, 2026
Questions Deadline	June 22, 2026
Proposals Due	July 6, 2026, by 5:00 PM MT
Award Notification	July 24, 2026
Service Commencement	August 10, 2026
Submit Proposals To	Brad Niva info@visitbigskymt.com PO Box 160100 Big Sky, MT 59716

1. Introduction & Background

The Big Sky Chamber of Commerce and Visit Big Sky (collectively, the "Organizations") are issuing this Request for Proposal (RFP) to identify and engage a qualified accounting and financial management firm to provide comprehensive bookkeeping, payroll, spend management, fractional CFO services, and general accounting services.

1.1 About the Organizations

Big Sky Chamber of Commerce

The Big Sky Chamber of Commerce is a nonprofit membership organization (501(c)(6)) that serves as the primary business advocacy organization for the Big Sky, Montana community. Revenue is primarily driven by membership dues, event income, public funds and sponsorships. The Chamber is governed by a volunteer Board of Directors.

Visit Big Sky

Visit Big Sky is a nonprofit (501(c)(6)) destination marketing organization (DMO) responsible for promoting Big Sky as a premier travel destination. Funding is derived from lodging tax revenues (Bed Tax) the Department of Commerce of Montana, local resort tax funds, tourism grant funding, and revenue raised by advertising. Visit Big Sky manages grant compliance, pass-

through funding relationships, and government reporting requirements unique to tourism-funded organizations.

2. Scope of Services

The selected firm will provide services across the two organizations with appropriate entity-level segregation. The following scope applies collectively unless noted.

2.1 Bookkeeping & General Accounting

- Full-cycle bookkeeping including accounts payable, accounts receivable, and general ledger maintenance for each entity
- Monthly bank and credit card account reconciliations
- Maintenance of a chart of accounts tailored to each organization's funding model
- Fund accounting support for grant-restricted and government-restricted revenue
- Membership dues tracking, invoicing, and receivables management (Chamber)
- Compliance of funds, allocation, and compliance tracking (Visit Big Sky and CVB)
- Monthly financial statements: balance sheet, income statement, and cash flow report for each entity
- Fixed asset schedules and depreciation tracking
- Year-end close procedures and audit-ready workpapers

2.2 Payroll Services

- Processing of semi-monthly payroll for all employees
- Federal & state payroll tax withholding, remittance, and reconciliation
- Preparation and filing of Form 941, Montana Withholding Tax, and unemployment insurance reports
- W-2 preparation and distribution; new hire reporting and onboarding support
- Leave accrual and PTO tracking; coordination with benefits providers
- Direct deposit administration
- Payroll reporting by cost center or grant as required for fund accounting compliance
- Experience with Rippling or similar payroll processing

2.3 Spend Management

- Implementation and administration of an integrated spend management platform and familiarity of Rippling platform or something similar
- Establishment of approval workflows and spending policies in coordination with leadership
- Vendor setup, W-9 collection, and 1099 preparation and filing
- Accounts payable processing including invoice approval, coding, and payment scheduling
- Credit Card reconciliation and policy compliance review

- Grant-specific expenditure tracking and allowable cost verification
- Budget vs. actual reporting to support board-level financial oversight

2.4 Financial Reporting & Compliance

- Monthly board financial reports for each organization due by 2nd Friday of the month
- Annual budget preparation support and multi-entity budget consolidation
- Grant financial reporting
- Coordination with external auditors for annual financial audits or reviews
- IRS Form 990 preparation support or coordination with tax preparer

2.5 Fractional CFO Services

The Organizations seek fractional Chief Financial Officer services to provide executive-level financial leadership on a shared, part-time basis. This reflects the growing financial complexity across both entities and the need for strategic guidance beyond day-to-day bookkeeping.

- Strategic financial planning and multi-year budgeting aligned to each organization's mission and funding cycles
- Cash flow forecasting and liquidity management, particularly given Big Sky's seasonal tourism economy
- Development and oversight of financial policies, internal controls, and risk management frameworks
- Attendance and financial leadership at Board Finance Committee meetings on monthly basis for both board of directors
- Guidance on grant strategy, funding diversification, and long-term financial sustainability
- Support for banking relationships, reserve fund policies, and any financing needs
- Cross-organizational coordination to identify shared efficiencies and flag multi-entity financial risks
- Representation in communications with Department of Commerce, auditors, and funding agencies
- Goal Setting and monthly check-ins on financial goals with CEO and Staff

2.6 Advisory & Strategic Support

- Cash flow forecasting and liquidity management recommendations
- Internal controls assessment and policy development
- Accounting software selection and implementation support if transition is recommended
- Training for organizational staff on expense coding, reporting tools, and financial processes

3. Organization-Specific Requirements

3.1 Big Sky Chamber of Commerce

- Membership management integration: reconciliation of dues payments from CRM or membership platform
- Event revenue and expense tracking by event type
- Sponsorship income recognition and sponsor reporting support
- 501(c)(6) compliance awareness including lobbying expenditure tracking if applicable

3.2 Visit Big Sky

- Fund accounting for funds from Department of Commerce and Big Sky Resort Area District and restricted grant funds
- Cooperative marketing fund management and partner billing
- Grant compliance tracking including approved budget vs. actuals, drawdown schedules, and reporting deadlines
- Preparation of required financial reports for state and local tourism funding agencies
- Multi-source revenue reconciliation (bed tax, grants, partnerships, earned income)
- Governmental fund accounting consistent with GASB standards or applicable nonprofit/government-funded entity standards
- Annual audit support- per rules and regulations of Department of Commerce funding

4. Qualifications & Experience

- Minimum five (5) years of experience providing outsourced accounting or bookkeeping services to nonprofit organizations
- Demonstrated experience with fund accounting and restricted grant management
- Prior experience with destination marketing organizations (DMOs), tourism organizations, chambers of commerce, or government-affiliated nonprofits preferred
- Familiarity with Montana nonprofit and charitable registration requirements
- Proficiency in cloud-based accounting platforms (QuickBooks Online)
- CPA on staff or available as a resource for technical accounting questions and audit support
- Fractional CFO or senior financial leadership experience with nonprofit or public-sector entities
- Experience supporting IRS Form 990 preparation or coordinating with external tax preparers
- Demonstrated capacity to serve multiple affiliated entities simultaneously with appropriate segregation of duties

5. Proposal Requirements

5.1 Cover Letter

A brief cover letter (maximum two pages) introducing the firm, expressing interest, and identifying the primary relationship manager.

5.2 Firm Overview

- Firm name, legal structure, year established, and office location(s)
- Total firm size (professional staff, number of clients served)
- Number and description of current nonprofit clients, particularly those with government funding or grant compliance requirements
- Any CPA affiliations, bookkeeping networks, or technology partnerships

5.3 Relevant Experience

Provide at minimum three (3) client references from nonprofit organizations similar in structure or complexity. For each reference, include organization name, type, scope of services, duration, and contact information.

5.4 Proposed Approach & Staffing

- Description of the service delivery model (dedicated team, shared team, primary point of contact)
- Proposed accounting platform(s) and spend management tools
- Onboarding and transition plan including estimated timeline
- How the firm ensures continuity of service during staff transitions
- Fractional CFO staffing: qualifications, availability, and approach

5.5 Fee Proposal

Provide an itemized fee schedule for services described in Sections 2 and 3, including:

- Monthly retainer or fixed-fee pricing by service category and by organization
- Fractional CFO services — monthly retainer or estimated hours and rate
- Hourly rates for out-of-scope or advisory services
- Any technology or platform fees passed to the client

Note: Pricing should be evaluable on both a per-entity and bundled multi-entity basis.

5.6 Additional Information

- Disclosure of any conflicts of interest with the Organizations or their affiliates
- Professional liability (E&O) insurance coverage amount and carrier
- Data security practices and protocols for handling confidential financial information
- Identification of any subcontractors or third-party providers utilized in service delivery

6. Evaluation Criteria

Proposals will be evaluated by a selection committee representing leadership from the two Organizations. Scoring criteria:

Evaluation Criterion	Weight
Relevant nonprofit and governmental accounting experience, including fund accounting and grant compliance	**25%**
Fractional CFO qualifications and strategic leadership experience	**20%**
Technical approach, service delivery model, and staffing plan	**15%**
Proposed fee structure and overall value	**15%**
Quality and depth of client references	**15%**
Technology platform capabilities and integration approach	**10%**

7. Process & Timeline

RFP Issued	June 3, 2026
Pre-Proposal Q&A Deadline	June 22,2026 Questions submitted in writing to info@visitbigskymt.com
Q&A Responses Distributed	June 26, 2026
Proposals Due	July 6, 2026, by 5:00 PM Mountain Time
Finalist Interviews	July 20- 24, 2026
Award Notification	July 24, 2026
Contract Execution Target	July 31, 2026
Service Commencement	August 10, 2026

The Organizations reserve the right to modify this timeline. All modifications will be communicated to firms that have acknowledged receipt of this RFP.

8. Submission Instructions

- Submit proposals electronically in PDF format to info@visitbigskymt.com by the deadline in Section 7
- Subject line: "RFP Response — Financial Services — [Firm Name]"

- Proposals should not exceed 15 pages excluding appendices
- Firms wishing to acknowledge receipt or submit questions should do so by to info@visitbigskymt.com
- All questions and responses will be shared with all acknowledging firms

9. Terms & Conditions

- This RFP does not constitute a contract or commitment to award services. The Organizations reserve the right to accept, reject, or negotiate any or all proposals.
- All submitted materials become the property of the Organizations and will not be returned.
- Issuance of this RFP does not obligate the Organizations to pay any costs incurred by respondents in the preparation or submission of a proposal.
- The Organizations reserve the right to request clarification or additional information from any respondent.
- Any contract resulting from this RFP is subject to approval by each organization's respective Board of Directors.
- Selected firm must maintain appropriate professional liability (Errors & Omissions) insurance throughout the engagement.

10. Contact Information

Primary Contact	Brad Niva CEO
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Thank you for your interest in serving the Big Sky community. The Organizations look forward to reviewing your proposal.