



Request for Proposal for Financial Services

Greetings:

You are invited to submit a proposal for our Financial Services contract position in accordance with the requirements set forth in the attached request for proposal (RFP). This invitation is extended to Certified Public Accountants that are currently Licensed and Insured. You may also pass this invitation along to a friend or colleague that meet these requirements.

The United Country Western Dance Council®, a Not-for-Profit organization, is an international organization which promotes country western dance by producing festivals and competitions in over 25 countries, representing over 2,000 dancers. We host the annual Country Dance World Championships® and European Open Championships for couples, team, and line dancers. We advocate country dancing as a social activity for people of all ages and abilities.

Please submit any questions regarding the RFP via email, to Carmen Mattei at financialoversight@ucwdc.org, prior to the March 1, 2023.

The electronic version of your proposal, must be received no later than March 31, 2023 or your proposal will otherwise be disqualified.

The contract will be awarded prior to May 1, 2023 and the contract period will begin on May 1, 2023 and extend to May 1 2026.

Thank you for your time, effort, and interest in our Financial Services contract position.

Sincerely,

Carmen Mattei

UCWDC Financial Oversight Committee Chair

financialoversight@ucwdc.org

Attachment: Request for Proposal for Financial Services

United Country Western Dance Council®

Financial Services Agreement

This agreement is made by and between the United Country Western Dance Council® (hereafter, “the UCWDC®”) and TBD (hereafter “the Supplier”) for a range of financial and accounting services. The parties to this Agreement understand the Supplier shall perform the duties described herein as an independent contractor.

Agreement Provisions:

1. Reporting Requirements

The Supplier shall report directly to, and receive direction from, the Chairman of the UCWDC Financial Oversight Committee. The Supplier shall also work in conjunction with the UCWDC President, Treasurer and other UCWDC officers as necessary.

2. Scope of Work

The financial and accounting services to be provided by the Supplier shall include (but not be limited to) the following tasks:

- Provide necessary bookkeeping services
- Create, maintain, and reconcile as necessary, UCWDC financial records including QuickBooks files, bank accounts, budgets and other financial reports.
- Recommend fiscally advantageous methods to save money, increase accuracy and improve efficiencies.
- Prepare and file required annual tax returns
- Attend the spring and fall meetings of the UCWDC directors.
- As requested, prepare and present financial reports, including “the Treasurer’s Report”, at the semi-annual Directors Meetings.
- Provide oversight on bank accounts and budgets.
- Participate in strategic planning, money management, fraud prevention and budget development efforts.
- Develop programs and practices to improve the UCWDC’s status as a Not for Profit organization, and monitor the organization’s compliance with the legal requirements, practices and policies that support the Not for Profit status.
- Participate in the development and management of a Grant Program.
- Work with registration personnel to track the income and expenses for the annual UCWDC Hosted Country Dances Championship events including Worlds, European Championship and Asian Championship.
- Write checks (no signing authority) and send forward to appropriate officers for signatures. Initiate and receive wire transfers with written authorization.

3. Term of Agreement

This Agreement shall become effective as of May 1, 2023, and shall remain in effect until May 1, 2026. This agreement may be terminated for cause or convenience by either party by providing written notice 30 days in advance.

**United Country Western Dance Council®
Financial Services Agreement**

4. Compensation Provisions

The “flat fee” compensation for work performed under this agreement shall be **\$TBD** per month, payable on the 1st day of each month. Additionally, upon receipt of appropriate expense documentation, the UCWDC shall reimburse the Supplier’s reasonable and necessary travel and housing expenses (not meals expenses) for each of the semi-annual directors’ meetings.

5. Confidentiality

The Supplier unconditionally agrees never to disclose UCWDC proprietary information to anyone outside the UCWDC. Proprietary information shall include but not be limited to the financial status of the organization, any and all financial records, and the details regarding discussions held in committee and/or UCWDC directors’ meetings. Non-compliance with this provision may result in the immediate termination of this Agreement.

6. Entire Agreement

This Agreement represents the entire agreement made between the UCWDC and **TBD**. The terms and provisions of this Agreement are the final expression of understanding between the parties and cannot be contradicted by any evidence of any prior written agreement or contemporaneous oral agreement. Any future changes to the provisions of this Agreement must be made and approved in writing.

Signatures:

TBD,
Certified Public Accountant

Carmen J Mattei, Chairman
Financial Oversight Committee

Date

Date

Tim Perez,
UCWDC Treasurer

Keith Armbruster,
UCWDC President

Date

Date