

United Academics  
AAUP/AFT local 4996  
P.O. Box 755895  
Fairbanks, AK 99775-5895  
unitedacademicsak.org



## United Academics Request for Proposal for Accounting Services

United Academics AAUP/AFT Local 4996, is accepting proposals from certified CPAs or bookkeepers to

1. Manage payroll
2. Pay invoices
3. Reconcile, record and maintain financial transactions
4. Provide monthly financial reports
5. File federal tax returns
6. Coordinate with an outside CPA to complete yearly audit
7. Work with union leadership to ensure compliance with all federal, state and affiliate financial regulations and requirements

The contract will begin on July 1, 2024, to be reviewed every three years. The firm must be physically located in Alaska. Knowledge of and experience with public sector labor unions and associated financial requirements for labor unions will be considered ideal.

### Description of United Academics

United Academics AAUP/AFT Local 4996 is a statewide 501(c)(5) labor organization representing approximately 1,100 University of Alaska faculty members and post doctoral fellows. Annual revenues are approximately \$800,000. The organization employs two full time staff members in addition to buying-out work time for union officers and negotiation team members and employing one or more members part time during the summer.

### Relationship with Current CPA Service Provider

These services are currently being provided by Ledger Linq, LLC, which is invited to submit a proposal in response to this request. United Academics leadership has determined that due diligence requires opening this contract to a periodic request for services.

### Conflict of Interest

To avoid potential conflicts of interest, United Academics will not consider any accounting firm that has done business with any part of the University of Alaska within the past ten years.

### Responding to This Request for Proposals

Please submit your completed proposal to Nelta Edwards via email (address below) by no later than 5:00 p.m. AKST on March 15, 2024.

Please include the following information in your proposal:

**Experience**

- Provide a summary of your firm’s experience and why the selection of your firm is the best decision we could make. Be sure to include:
  - a. Your firm’s experience in providing accounting services to public sector unions or similar organizations in the not-for-profit sector.
  - b. Your average length of service to other organizations.
  - c. Identification of the partner, manager, and/or in-charge accountant who will be assigned to our job if your bid is successful.
  - d. Any complaints leveled against your firm or individuals within your firm by the Alaska Board of Public Accountancy or other regulatory authority, if any.
  - e. A discussion of your firm’s use of technology and backup practices in maintaining accurate and complete accounting records of the day-to-day, monthly, and annual accounting needs of United Academics, as described above.

**Rate**

- Propose a monthly rate for accounting services to begin July 1, 2024, with estimates of increases in future years.

**References**

- Provide the names and contact information for at least two other, similarly sized clients for reference purposes.

**United Academics Leadership and Personnel**

Following are contacts for information you may seek in preparing your proposal:

Dr. Jill Dumesnil	President	<a href="mailto:jill.dumesnil@unac4996ak.com">jill.dumesnil@unac4996ak.com</a>
Dr. Nelta Edwards	Treasurer	<a href="mailto:nelta.edwards@unac4996ak.com">nelta.edwards@unac4996ak.com</a>
Dr. Melanie Arthur	Contract Manager (staff)	<a href="mailto:melanie.arthur@unac4996ak.com">melanie.arthur@unac4996ak.com</a>
Kate Quick	Organizing Manager (staff)	<a href="mailto:kate.quick@unac4996ak.com">kate.quick@unac4996ak.com</a>

**Evaluation of Proposals**

United Academics will evaluate written proposals starting March 15, 2024, with a decision by May 1, 2024.

Please submit your proposal to Nelta Edwards via email by March 15, 2024.