



Request for Proposals (RFP): Part-Time Contract Bookkeeper and Accounting Services

Issued by: Church Benefits Association (CBA)

Proposal Due Date: September 11, 2026

Anticipated Start Date: October 2026

Opportunity

The Church Benefits Association is seeking proposals from **qualified individuals, CPAs, and accounting/bookkeeping firms to provide part-time contract bookkeeping and accounting services**, including general ledger maintenance, financial reporting, grant accounting, audit support, and related nonprofit financial management services.

The selected contractor or firm will support a small nonprofit organization with four remote staff members.

The successful contractor or firm will begin in October 2026 and work alongside the current bookkeeper through the end of the year to ensure a smooth transition. The current bookkeeper is reducing her client workload and will transition CBA to a new bookkeeping partner.

About the Church Benefits Association

The Church Benefits Association (CBA) is a trusted network of faith-based benefits professionals committed to providing high-quality health and retirement benefits to plan participants for more than 100 years, since 1915.

The Association encourages collaboration among its member organizations and provides a supportive environment that creates greater value for the communities they serve.

With more than 50 member organizations, CBA's network serves more than one million clergy, lay workers, and their families, supporting faith communities that include approximately 30 million denominational members. This collective strength makes CBA a leading association for U.S. denominational benefit programs and a trusted resource for faith-based benefit professionals.

In 2025, CBA was awarded a **\$30 million grant from Lilly Endowment Inc.** to serve as the national hub for clergy wellness grants. The successful contractor or firm will support the financial recordkeeping and reporting associated with this significant multi-year grant and should have experience with nonprofit grant accounting and financial reporting.

Estimated Time Commitment

- Approximately **1–8 hours per week**, depending on the time of year and organizational needs.
- Hours may increase during month-end and year-end close, audit preparation, annual budget development, grant reporting, and other reporting periods.

Scope of Services

The selected contractor or firm will be responsible for maintaining the organization's day-to-day financial records and supporting the Executive Director and Treasurer of the Board. Responsibilities include, but are not limited to:

- Process approved accounts payable and pay vendor invoices.
- Record deposits and other financial transactions.
- Maintain accurate financial records in QuickBooks.
- Reconcile bank, credit card, and investment accounts.
- Prepare monthly financial statements and reports for the Executive Director, Treasurer, and Board of Directors.
- Monitor budget-to-actual performance and assist with financial analysis.
- Prepare journal entries, as needed.
- Maintain the general ledger and supporting schedules.
- Assist with cash flow monitoring.
- Track restricted and unrestricted funds and maintain appropriate grant accounting records.
- Support the financial management and reporting requirements of CBA's Lilly Endowment-funded clergy wellness initiative.
- Coordinate with the audit chair, corporate treasurer, and external auditors for the annual audit.
- Prepare schedules and documentation requested by auditors and accountants.
- Maintain organized financial records and supporting documentation.
- Assist with year-end closing activities.
- Ensure compliance with nonprofit accounting standards, grant requirements, and internal financial controls.
- Assist with preparation of the annual operating budget.
- Record payroll-related accounting entries (payroll is processed through a third-party provider).

- Prepare or assist with any required state or local financial filings.
- Recommend improvements to accounting processes and financial reporting.

Qualifications and Experience

Preference will be given to individuals or firms with:

- CPA Designation, either held by the individual contractor or by one or more professionals serving the CBA account.
- Demonstrated bookkeeping and accounting experience, preferably with nonprofit organizations.
- Strong proficiency with **QuickBooks**.
- Knowledge of nonprofit accounting principles, including restricted funds and grant accounting.
- Experience preparing financial reports for executive leadership and boards of directors.
- Experience supporting annual audits.
- Strong attention to detail and organizational skills.
- Ability to work independently in a fully remote environment.
- Excellent communication skills and responsiveness.
- Ability to maintain confidentiality and exercise sound judgment.

Contract Terms

- Independent contractor engagement; CBA is open to contracting with either an individual or an accounting/bookkeeping firm.
- Fully remote.
- Flexible work schedule.
- Estimated workload of 1–8 hours per week.
- Contractor or firm must provide its own computer, software and office equipment necessary to perform the services.
- Compensation will be based on experience, qualifications, proposed hourly rate, and/or proposed fee structure.

Proposal Requirements

Please include:

1. Cover letter or letter of interest describing your interest in providing services to CBA and your qualifications.

2. Resume or company profile, as applicable.
3. Description of nonprofit bookkeeping and accounting experience.
4. Experience with QuickBooks.
5. Experience with grant accounting and financial reporting.
6. Experience supporting audits.
7. Proposed hourly rate or fee structure.
8. Estimated availability beginning October 2026.
9. Two or three professional references familiar with the proposed individual or firm's bookkeeping/accounting services.
10. If applying as a firm, please identify the individual(s) who would be primarily responsible for CBA's account and provide their relevant qualifications and experience.

Submission Information

Please submit proposals electronically no later than **September 11, 2026**.

Lori Wolking

Executive Director

Church Benefits Association

Email: lwolking@churchbenefitsassociation.org

Questions regarding this RFP may be directed to:

Lori Wolking

Email: lwolking@churchbenefitsassociation.org

Cell: **301-852-8110**

The Church Benefits Association reserves the right to reject any or all proposals, request additional information from respondents, negotiate with one or more respondents, and select the proposal that best meets the organization's needs.