



REQUEST FOR PROPOSAL (RFP)

For Audit and IRS Form 990 Preparation Services

Issued by:

Helena Food Share

1280 Boulder Ave

Helena, MT 59601

www.helenafoodshare.org

Jordan Evertz, Executive Director

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Issue Date: 1/25/2026

Proposals Due By: 2/28/2026

1. Introduction

Helena Food Share is a 501(c)(3) nonprofit food pantry that has provided emergency and supplemental food assistance to those in the greater Helena area since 1987. Our mission is to serve our neighbors in need by providing food in a respectful and dignified way and by working with others to eliminate hunger in the greater Helena area. We pursue this mission while working toward our vision of creating a hunger-free community.

Helena Food Share received a 2024 New Market Tax Credit allocation utilizing a conventional leveraged fund structure, which necessitated the creation of the Helena Food Share Holding Company.

We are seeking proposals from qualified independent CPA firms to perform our annual financial statement audit and prepare our IRS Form 990 for the fiscal year ending June 30, 2026, for Helena Food Share, Inc. and Helena Food Share Holding Company, with the option to renew for [2-3] additional years.



2. Scope of Services

- A. Annual Financial Audit
 - Conduct an independent combined audit of Helena Food Share, Inc. and Helena Food Share Holding Company’s financial statements in accordance with GAAS.
 - Express an opinion on the fairness of presentation in conformity with U.S. GAAP.
 - Provide a report to the Finance Committee and Board of Directors.
 - Communicate internal control deficiencies and recommendations, if any.
 - Attend a Board of Directors meeting to present findings.
- B. IRS Form 990 Preparation
 - Prepare federal Form 990 and applicable state filings for both Helena Food Share, Inc. and Helena Food Share Holding Company separately.
 - Assist in addressing questions from the Board and management.
 - Provide a draft for review and revise based on feedback.

3. Timeline

Task	Target Date
RFP Issued	1/25/2026
Deadline for Questions	2/20/2026
Proposal Due	2/28/2026
Finalist Interviews	3/9/2025
Firm Selection	3/31/2026
Audit Start Date	August 2026
Draft Audit Due	10/15/2026
Final Audit/990 Due	11/15/2026

4. Proposal Requirements

Please include the following in your proposal:

- Firm Background and Qualifications
 - History and size of the firm.
 - Nonprofit sector experience, especially with organizations of similar size and complexity.
- Staffing and Team
 - Bios of proposed engagement team members.
 - Office location(s) and availability.
- Approach and Timeline
 - Proposed audit plan and use of technology.
 - Communication strategy with management and board.
- Relevant Experience and References
 - List of three nonprofit clients, including contact info.



— Provide most recent peer review results.

- Fee Proposal

- Fixed fee or detailed cost structure.
- Separate pricing for audit and 990 prep.
- Hourly rates for additional services.

5. Evaluation Criteria

- Experience with nonprofit audits and 990s
- Qualifications of key personnel
- Approach and responsiveness
- Fee structure and value
- References and past performance

6. Submission Instructions

Please submit your proposal electronically in PDF format to:

Jordan Evertz, Executive Director

Email: jordan@helenafoodshare.org

Subject Line: RFP Submission – Audit & 990 Services

Optional hard copies can be mailed to:

P.O. Box 943

Helena, MT 59624

7. Additional Information

- Helena Food Share, Inc. had an operating budget of \$2,450,491 in FY2025. Helena Food Share, Inc. created the Helena Food Share Holding Company to obtain funding from New Market Tax Credit (NMTC). The Holding Company received NMTC funding to build a new building, which the Holding Company leases to Helena Food Share, Inc. The building was substantially complete in fiscal year 2025.
- Our accounting is handled in QuickBooks utilizing Bill Accounts Payable and Bill Spend and Expense.
- We contract with HJHudson Consulting, a certified public accounting firm with a specialty in nonprofit accounting, for accounts payable and expense, accounts receivable and revenue, audit and tax preparation assistance, budget services, financial accounting policy and procedure, grant collaboration and support, month-end closure, payroll processing, and advisory services.
- Prior audit reports and 990s are available upon request.
- We are exempt under IRS Code Section 501(c)(3) and not classified as a private foundation.