



Request for Proposal
For the ERC (Employee Retention Credit)

Date Issued: May 16th, 2022

Date Due: May 25th, 2022

3:00 PM MST

Greenwood Charter School

Attention: Matt Lovell

840 N Hwy 89

Harrisville, UT 84404

Phone: 208-590-2972

Email: matt@redapplefinance.com

1. General

Project Description

Greenwood Charter School desires to pursue the Federal Governments ERC program. Qualified bidders will:

- Determine eligibility of School in Revenue Qualifying ERC
- Determine eligibility of School in the Non Revenue Qualifying aspects
- File amendments to IRS based on first two qualifying points
- Offer ongoing audit support if needed relative to ERC Filings

Key Dates

- RFP begins Monday, May 16th, 2022, and ends Wednesday, May 25th, 2022 @ 3:00 MST
 - Anticipated award date will be Friday, May 27th, 2022, with the winning bidder being notified by Friday, June 3rd, 2022
 - Project is anticipated to begin immediately upon notification
 - All proposals shall be emailed to Matt Lovell, at matt@redapplefinance.com
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2. Service Requirements

- Credibility and Expertise – Bidders are required to be a company who has been in business for at least 3 years, and regularly performs tax services outside of the ERC. Bidders must show that the work will be performed in-house, and not farmed out to other companies. No “pop-up” companies. Additionally, companies must show that they have a CPA on staff, and preferably a tax attorney as well
- Compliance – Bidders must show that they will conduct a comprehensive qualification process, and build out an audit support deck, in case the school goes through an audit at a later point in time

3. Submission Guidelines

Bidders Profile

Bidders must identify relevant administrative, management, and financial capabilities as well as technical skills, qualifications and experience necessary and appropriate to the evaluation of their ability to successfully complete the proposed project and meet the objectives of the RFP.

Bidders will provide, with their proposal, at least 3 references, including contact information of the end-user, for completed projects of similar nature.

Submission Format

Bidders should submit their proposal in the preferred format:

- Letter of Introduction: Contractor name, contact person, address, telephone number, email, and a brief introduction to the bidding company
- Proposed Project Timeline: Timeline of work required and projected schedule to complete project
- Similar Project History: If applicable, please provide project descriptions of prior charter school projects
- Additional Information: Any additional information that would help Greenwood Charter School make an informed decision
- Bidders must submit the Narrative Proposal portion of the RFP, and the Cost Proposal portion of the RFP **SEPARATELY**. These two responses must be sent in separate documents, and must not reference the other one. Failure to follow this format, may disqualify the bidder

Evaluation Criteria

Bid will be awarded to the firm whose proposal is determined to be the most advantageous to Greenwood Charter School after consideration of all criteria.

Narrative Proposal - The Criteria for evaluation will focus primarily on:

- Timeline and ability to complete the project (25 pts)
- Demonstrated ability to meet the scope of work (25 pts)

- Meeting the requirements outlined in the “Service Requirements” Section of the RFP (25 points)

Cost Proposal

- Cost proposal for project completion and detail (25 pts)

Acceptance of Proposal

- Bids will be reviewed in a public meeting after the due date and time with the name (name only) of the bidder announced and recorded in the meeting minutes
- Bid will be awarded to the firm whose proposal is determined to be the most advantageous to the school after the consideration of all criteria
- The winning bidder will receive the award in writing
- The school reserves the right to reject any or all proposals or to waive any formality or technicality in the best interest of the school

Disclosure

All documents submitted by bidders shall become the property of the school. Proposal information is proprietary and such shall be treated as confidential. Information pertaining to the school obtained by the bidder as a result of participation in this project is confidential and must not be disclosed without written authorization from the school.

Best and final offers may be allowed, as provided in Section 63G-6A-707.5, from responsible offerors who submit responsive proposals that meet minimum qualification, evaluation criteria, or applicable score thresholds identified in the request for proposal.