



Request for Proposal
For the Employee Retention Credit

Date Issued: July 6, 2022

Date Due: July 13, 2022,

5:00 PM MST

Valley Academy

Attention: Tracy Stevens

539 North 870 West

Hurricane, UT 84737

Phone: 435-635-7815

Email: tracy@valleyacademycharter.com

1. General

Project Description

Valley Academy desires to pursue the Federal Government Employee Retention Tax Credit (“ERC”) program. Qualified bidders will:

- Determine eligibility of School in Revenue Qualifying for ERC tax credit
- Determine eligibility of School in the Non-Revenue Qualifying aspects
- File amendments on behalf of the School to the IRS based on first two qualifying points
- Offer ongoing audit support if needed relative to ERC Filings documentation and follow-up paperwork to the IRS and relevant agencies.

Key Dates

- RFP begins Wednesday, July 6, 2022, and ends Wednesday July 13, 2022 @ 5:00 PM MST
- Anticipated award date will be Thursday, July 14, 2022, with the intent that the winning bidder being notified Friday July 15, 2022
- Project is anticipated to begin immediately upon notification with updates provided to VAC Board Chair and Principal Stevens.
- All proposals shall be emailed to Tracy Stevens, at tracy@valleyacademycharter.com

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.

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- Bidders must disclose any actual, or potentially perceived, Conflicts of Interest in providing this service to VAC.
 - Bidders must agree that:
 - Should the Government Entity deny VAC's application, there will be no **fee (or a de minimus fee?)** paid to Contractor.
 - Should the ERC credit be awarded to VAC, and then later rescinded, withdrawn or reversed (included but not limited to requiring VAC to refund the awarded amount), based on the information submitted by the Contractor, or due to a Conflict of Interest or other issue related to the Contractor, the Contractor will be the party liable for the repayment of the ERC credit awarded to VAC.

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
- References (3) of other Utah Charter School Board Members or Administrative Staff who have used Contractor for these applications.
- Additional Information: Any additional information that would help Valley Academy make an informed decision
- State any actual or potentially perceived Conflict of Interest the Contractor may have in fulfilling this RFP.
- Should the Government Entity deny VAC's application, state the amount, if any, to be paid to the Contractor for services rendered. (Preference will be given to Contractors who agree to not charge for services if ERC award is not made to VAC)
- Bidders must submit complete RFP by Wednesday July 13, 2022 5:00 PM. RFP response must include information requested, as well as price/cost proposal.

Evaluation Criteria

Bid will be awarded to the firm whose proposal is determined to be the most advantageous to Valley Academy after consideration of all criteria.

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

Valley Academy

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- Timeline and ability to complete the project (25 pts)
- Demonstrated ability to meet the scope of work. (References will be heavily considered in this point award) (25 pts)

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- Meeting the requirements outlined in the “Service Requirements” Section of the RFP and the full completion of the items listed in Submission Format. (25 points)

Cost Proposal (25 points)

- Cost proposal for project completion including itemized detail of fee awards if:
 - Contractor analyzes VAC and determines they are not eligible for ERC application.
 - Contractor determines VAC is eligible and application is completed, but no award is made by the Government.
 - Contractor submits ERC application on behalf of VAC and the Government awards funds.

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 cancel the bid without award.

Disclosure

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