

**REQUEST FOR PROPOSALS (RFP #2026-01)
Small Business Tax Preparation & Compliance Services
Not-to-Exceed (NTE): \$75,000**

Introduction & Background

The Miami Valley Urban League (MVUL) is seeking qualified vendors to provide business-focused tax preparation and compliance services to small businesses.

This initiative is supported by American Rescue Plan Act (ARPA) funding through the City of Dayton and is designed to support small business recovery, strengthen financial management, and improve regulatory compliance.

Purpose

To provide business-specific tax preparation and compliance assistance to small businesses. Services must focus exclusively on business tax matters; personal tax preparation is not permitted.

Scope of Services

Selected vendor(s) will provide comprehensive, business-focused tax preparation and compliance services designed to support small businesses in maintaining financial accuracy and meeting regulatory requirements. Services will include the preparation of business tax filings for a range of entity types, including sole proprietors (Schedule C), limited liability companies (LLCs), partnerships, and S-corporations. In addition, vendors will deliver individualized tax compliance consultations to help business owners understand and fulfill their federal, state, and local tax obligations.

Vendors will also provide guidance on effective record-keeping practices and overall tax readiness, ensuring that businesses are equipped with the tools and systems needed to maintain accurate financial documentation and prepare for future filings or audits. To support broader capacity building, vendors will conduct group-based workshops, clinics, or seminars that address common tax topics and promote shared learning among business owners. Finally, vendors will offer one-on-one consultations tailored to the specific needs of individual businesses, providing targeted technical assistance to address unique tax situations and compliance challenges.

Note: MVUL reserves the right to engage multiple vendors.

Deliverables

The selected vendor(s) will be responsible for delivering clearly defined services and outputs that demonstrate measurable support to small businesses. Deliverables are intended to capture both the volume and quality of services provided, ensuring accountability and alignment with program goals. Vendors must document all services delivered and provide a comprehensive summary of outcomes at the conclusion of the contract period. Deliverables should include:

- Tax and/or compliance services delivered to a defined number of small businesses
- Minimum of one (1) group educational session or clinic
- Service logs documenting businesses served, service dates, and service types
- Final summary report

Performance Standards

All services must be delivered in accordance with high professional and ethical standards to ensure quality, accuracy, and reliability. The selected vendor(s) are expected to demonstrate subject matter expertise, maintain strict confidentiality, and provide timely, client-centered service. Performance will be evaluated based on adherence to these standards and the vendor's ability to meet all contractual obligations within the established timeframe. The standards will be evaluated based on:

- Services must be delivered by **licensed or qualified tax professionals** (CPA, EA, or equivalent)
- Strict confidentiality of all business information
- Timely and accurate service delivery
- Completion of all services within the contract term

Contract Term

The contract term establishes the timeframe for service delivery, expenditure of funds, and completion of all required reporting. Vendors must be prepared to begin services promptly upon execution of the agreement and ensure that all activities, including service delivery and financial expenditures, are completed within the designated period. Closeout and reporting requirements will extend through the end of the contract term to ensure full documentation of program outcomes.

- Contract period: **May 15, 2026 – July 15, 2026**
- All funds must be expended by **July 31, 2026**
- Reporting and closeout activities may continue through contract end

Budget, Pricing & Service Capacity Requirements

Respondents are required to submit a detailed and transparent budget that reflects the full scope of proposed services and aligns with the number of businesses to be served. This section is designed to ensure cost clarity, promote cost efficiency, and enable equitable comparison across proposals. Vendors must demonstrate a clear relationship between proposed costs, service delivery approach, and overall program impact, including their strategy to maximize the number of businesses served within available funding. The following should be included in the proposal:

- **Line-Item Budget (MANDATORY)** Respondents must submit a detailed, itemized budget including:
 - ⇒ Cost per tax return (by business type, if applicable)
 - ⇒ Cost per compliance consultation

- ⇒ Cost per one-on-one consultation
- ⇒ Cost per workshop/clinic
- ⇒ Administrative/reporting costs (if applicable)
- **Service Capacity Requirement (MANDATORY)** Respondents must clearly state:
 - ⇒ Total number of businesses to be served
 - ⇒ Breakdown of services (e.g., returns completed, consultations, workshops)
 - ⇒ Monthly or phased service targets
- **Cost Efficiency** Respondents must provide:
 - Cost per Business = Total Proposed Cost ÷ Total Businesses Served
- **Budget Narrative** should include:
 - ⇒ Pricing assumptions
 - ⇒ Service delivery model
 - ⇒ Strategy for maximizing number of businesses served

Failure to provide itemized pricing and service capacity may result in disqualification.

Eligibility Requirements

This section outlines the minimum qualifications necessary to be considered for this opportunity. Respondents must demonstrate the technical expertise, professional credentials, and relevant experience required to successfully deliver the proposed services. Preference may be given to vendors located in the City of Dayton with experience supporting small or underserved business communities based on these criteria:

- Demonstrated experience in small business tax preparation
- Knowledge of federal, state, and local tax requirements
- Appropriate licenses and certifications
- Experience working with small or underserved businesses (preferred)

Proposal Requirements

Respondents must submit a complete and well-organized proposal that clearly outlines their qualifications, approach, and capacity to deliver the requested services. Proposals should provide sufficient detail to demonstrate the respondent's understanding of the scope, their strategy for effective implementation, and their ability to achieve the desired outcomes within the contract period and include:

- ***Organizational Overview***
Respondents must provide an overview of their organization, including relevant background, experience, and demonstrated expertise in delivering services similar to

those outlined in this RFP. This section should highlight the organization's capacity to successfully support small businesses and deliver high-quality outcomes.

- ***Technical Approach***

Respondents must describe their proposed approach to delivering services, including their overall service delivery model, strategies for outreach and engagement, and methods for conducting workshops or educational sessions. The approach should reflect a clear understanding of small business needs and demonstrate how services will be delivered effectively and efficiently.

- ***Staffing Plan***

Respondents must identify key personnel who will be responsible for delivering services under this contract, including their roles, qualifications, certifications, and relevant experience. This section should demonstrate that the proposed team has the expertise necessary to meet all service requirements.

- ***Service Capacity & Output Plan***

Respondents must outline their proposed service capacity, including the total number of businesses to be served, assumptions related to service delivery, and a timeline for implementation. This section should also describe the respondent's strategy for ensuring equitable access to services and reaching a diverse range of small businesses.

- ***Budget Proposal***

Respondents must submit a detailed budget that includes a completed line-item breakdown of all proposed costs. The budget must clearly identify the cost per service and include a calculation of cost per business served. This section should demonstrate cost efficiency and alignment between proposed pricing and service delivery.

Reporting & Documentation Requirements

Accurate and timely reporting is essential to ensure accountability, track progress, and demonstrate program impact. Selected vendor(s) will be required to maintain detailed records of all services delivered and submit regular reports that document performance, expenditures, and outcomes. These reporting requirements support program oversight and ensure compliance with funding expectations and include:

- **Monthly Reporting**

Due by the **5th business day of each month** and must include:

1. Number of businesses served (monthly and cumulative)
2. Services delivered by type
3. Progress toward proposed goals
4. Monthly and cumulative expenditures

5. Narrative summary (accomplishments, challenges, adjustments)

- **Documentation**

Vendors must maintain service logs, attendance records, and supporting documentation of services

- **Final Report**

At the conclusion of the contract period, the selected vendor(s) will be required to submit a comprehensive final report that summarizes overall program performance and outcomes. The report must include the total number of businesses served, a detailed accounting of all services delivered, and a clear description of outcomes and overall impact. In addition, vendors must provide a final financial reconciliation that documents all expenditures and confirms alignment with the approved budget. This report will serve as the official record of service delivery and program effectiveness.

Failure to submit timely and complete reports may result in delayed payment or contract termination.

Procurement Timeline & Release Schedule

Milestone	Date
RFP Released	April 14, 2026
Questions Due	April 18, 2026
Responses Issued	April 21, 2026
Proposal Deadline	April 28, 2026 (5:00 PM EST)
Review Period	April 29 – May 5, 2026
Interviews (if needed)	May 6 – May 8, 2026
Notice of Award	May 10, 2026
Contract Execution	By May 14, 2026
Service Start Date	May 15, 2026

Submission Instructions

Deadline: April 28, 2026 (5:00 PM EST)
Format: PDF
Submission: info@mvul.org

Terms & Conditions

MVUL reserves the right to award multiple vendors

MVUL may reject any or all proposals

Vendors must be prepared to begin services immediately upon award