

**Compiled Questions and Answers from RFP Briefing and emails received before 8/29.**

- Do you have to be a CPA to apply for this opportunity?
  - No, while we will seek to have a balance of tax professionals with various credentials, you do not need to be a CPA. We do ask that you have a minimum of 3 years experience in business tax preparation.
- Can the selected providers publicize the program and recruit clients?
  - The City will lead the public facing advertisement of the program and recruitment, vetting and referral of businesses to selected providers. However, there will be opportunities for the providers to recruit clients and refer businesses to the program- we will work to coordinate these efforts once the providers have been selected.
- How will compensation work, how often will reimbursement be completed?
  - We expect to provide a small advance to selected providers at the beginning of the contract. After that, the database and case management system operated by Commerce will reflect the case load of each provider. As the turn in affidavits of completion, the Commerce Department will be able to generate invoices for payment on a monthly basis.
- Is the price for the 2025 tax filing fixed according to the table in the RFQ, or can tax preparers propose pricing they believe is more realistic? If yes, where should pricing be added since there is no pricing section in the response format
  - We will negotiate a price per service as a part of contract negotiations- I will adjust the form to reflect this question- the one guiding principal is that the average cost per business should not exceed \$1200 (outliers in both directions are expected)
- How should cases involving small businesses with back taxes be handled?
  - Back taxes will be considered a secondary service- we will screen for them ahead of time- so hopefully most referrals will already contain that information and an approval to proceed with doing back taxes. If the accountant discovers the issue- they will need city approval to proceed with the service.

- For **small** businesses that require extensive time for tax assessment and preparation i.e., those without a bookkeeping system or dedicated bookkeeper (that would have prepared the business income, expenses and financials records), who is responsible for covering the additional costs needed to prepare their 2025 books in order to file taxes?
  - We will establish a system for requesting additional funding to cover businesses with these needs. The goal would be to help cover those cases in full until the secondary services fund is exhausted.
- Should we also include estimated costs for the additional services at this time
  - Please feel free to include any pricing information that reflects primary or secondary services in your proposal.