



**CITY OF DETROIT  
OFFICE OF CONTRACTING AND PROCUREMENT  
REQUEST FOR QUOTE**

**RFQ NO. 184368  
Income Tax Preparation Services, Earned Income Tax Credit,  
Property and Home Heating Credits**

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Buyer: Elizabeth Ayana Johnson

<b>EVENT / ACTIVITY</b>	<b>DUE DATE / TIME</b>
<b>ADVERTISEMENT DATE</b>	January 30, 2024
<b>QUESTIONS DUE</b>	All questions must be submitted online via the RFQ Oracle Messages in the Supplier Portal by February 6, 2024 at 11:00 a.m.
<b>PRE-BID CONFERENCE</b>	None
<b>ANSWERS DISTRIBUTED</b>	RFQ answers will be posted in the Supplier Portal via RFQ Oracle Messages to all participants by February 8, 2024 at 3:00 p.m.
<b>QUOTES DUE DATE *</b>	February 13, 2024 at 3:00 p.m. In the Supplier Portal as specified in this RFQ.

\* Quotes must be uploaded into the Supplier Portal on, or prior to the exact date and time indicated above. Late or emailed quotes will not be accepted. Respondents must enroll in the Supplier Portal to download the bid documents and to ensure inclusion in our database [www.detroitmi.gov/supplier](http://www.detroitmi.gov/supplier). Instructions may be found on the City of Detroit website which includes tutorials on how to register. If you have any questions, please send an email to [procurementinthecloud@detroitmi.gov](mailto:procurementinthecloud@detroitmi.gov) or call (313) 224-4600.



## E-Procurement Open Assistance Sessions

### Learning How to Navigate Oracle

To join E-Procurement experts for Oracle demonstrations and Q&A pick one of the time slots

Virtual Learning Session (30 min. each)	Day & Time Option 1	Day & Time Option 2
Supplier Registration	<u>Mondays, 10:30 AM</u>	<u>Thursdays, 1:00 PM</u>
Supplier Profile Updates	<u>Mondays, 11:30 AM</u>	<u>Thursdays, 1:30 PM</u>
Responding to Bids	<u>Mondays, 9:30 AM</u>	<u>Fridays, 9:30 AM</u>
Invoicing	<u>Tuesdays, 1:30 PM</u>	<u>Fridays, 11:30 AM</u>
Online Office Hours (General)	<u>Tuesdays, 3:00 PM</u>	<u>Wednesdays, 9:30 AM</u>

Have additional Supplier Portal questions? Schedule a phone call with our E-Procurement Specialist  
here - [Supplier Portal Support Questions](#)



## **1. PROJECT REQUEST**

The City of Detroit Office of Contracting and Procurement (OCP) requests for quotes from qualified Respondents to render certain professional services ("Services") as set forth in this RFQ to provide income tax preparation services for the 2023 tax season including Earned Income Tax Credit (EITC), property and home heating credits for Detroit residents.

## **2. INTRODUCTION**

The City of Detroit, Housing and revitalization Department seeks qualified respondents to provide Income Tax Preparation Services to assist Detroit residents complete an anticipated 2,500 income tax filings.

## **3. AWARD CLAUSE INCLUDING RENEWAL OPTIONS**

If a contract is awarded as a result of this RFQ, it will be a City of Detroit **Professional Services Contract**. (Attachment E). **The term of the contract will be through November 2024.** Any renewal option exercised under this contract is effective only after the approval of the Detroit City Council and signed by the Chief Procurement Officer. **The City anticipates one or multiple awards as a result of the RFQ.**

## **4. STATEMENT OF WORK**

### **Scope of Work:**

Respondents will provide income tax preparation services including earned income tax credit, property and home heating credits for eligible Detroit residents.

Respondents must provide documentation of a valid IRS 2024 PTIN.

Respondents are not required to use volunteer tax preparers.

Only if respondent plans to use volunteer income tax preparers, must entity be an IRS VITA Partner.

Only if respondent plans to use volunteer income tax preparers, the contracted entity or entities may participate in the Detroit area tax credit coalition steering committee to support the coalition's coordinated strategy wherever possible.

Only if respondent plans to use volunteer income tax preparers, the contracted entity or entities may coordinate with United Way for SE Michigan to participate in the "one front door" schedule portal found on [getthetaxfacts.org](http://getthetaxfacts.org) to ensure system alignment for service provision.

Only if respondent plans to use volunteer income tax preparers, must the entity ensure staff and volunteers are properly trained to the level of returns they prepare, following IRS guidelines for VITA services.

## **5. OPERATIONAL INFORMATION**

Awarded Contractor(s) will work closely with City agency staff.

The Respondent is expected to provide service in accordance with the terms of the executed contract and under the rules, regulations, and supervision of the City.



## **6. MINIMUM QUALIFICATIONS**

Successful respondents, encouraged to be established in the State of Michigan, and present a team of individuals with the diversity of skill sets necessary to complete all tasks required by this scope of work. Multidisciplinary organizations who meet all the requirements of this RFQ will be considered. If the lead applicant is not based in Detroit, the city strongly encourages respondents to consider inclusion of team members that are Detroit-based, minority or women led. Or, otherwise have a substantive body of knowledge or experience in conducting business with the City of Detroit. Successful respondents will provide evidence of a valid IRS Preparer Tax Identification Number (PTIN) with bid submission.

## **7. TECHNICAL INFORMATION**

The City of Detroit is seeking a vendor to provide income tax preparation services for the 2023 tax filing season. Services to include income tax preparation for federal, state, and local (City of Detroit) tax returns delivered in-person, drop-and-go, or virtual (as needed).

Respondents are required to provide a bid quote stating their per unit rate. The contract will be based on a pay-for-performance model. Respondents must include in their bid quote a comprehensive per unit price that encompasses all expenses associated with successfully completing the task of filing eligible tax documents. The unit rate will be reimbursed upon completion of monthly invoicing to the City.

## **8. QUESTION DEADLINE**

**All questions regarding the RFQ shall be submitted through the Supplier Portal no later than the time and date specified on the Cover Page.** In the interest of transparency, only written questions will be accepted. Answers to questions will be posted within the Supplier Portal. The City of Detroit does not guarantee a response to questions not submitted after the question deadline.

Should a Respondent be in doubt as to the true meaning of any portion of this RFQ or find any patent ambiguity, inconsistency, or omission herein, the Respondent must make a written request for an official interpretation or correction in accordance with the instructions for submitting questions as specified in this RFQ.

Respondents are advised that no oral interpretation, information or instruction by an officer or employee of the City of Detroit shall be binding upon the City of Detroit

Respondents requesting changes to the RFQs terms and conditions, specifications, quantities, etc.; or if clarifications are needed, must make the request in writing by the stated bid submission deadline.

## **9. REJECTIONS, MODIFICATIONS, CANCELLATIONS**

The City of Detroit expressly reserves the right to:

- 1) accept or reject, in whole or in part, any and all quotes received;
- 2) waive any non-conformity;
- 3) re-advertise for quotes;



- 4) withhold the award for any reason the City determines;
- 5) cancel and/or postpone the request for quotes, in part or in its entirety, and/or,
- 6) take any other appropriate action that is in the best interest of the City.

This RFQ does not commit the City of Detroit to award a contract, to pay any cost incurred in the preparation of a quotes under this request, or to procure or contract for services.

## **10. PROTESTS**

Protests can be filed with the Office of Procurement. Interested parties aggrieved by a solicitation or the award of any resulting contract, may file written notice of protest to the following:

**City of Detroit Chief Procurement Officer  
2 Woodward Avenue, Suite 1008  
Detroit, MI 48226  
“Procurement Protest”**

At a minimum, such protests shall include:

- 1) name of protestor.
- 2) solicitation/contract number and description; and
- 3) statement of grounds for protest (reference specific text in the solicitation, bid or contract document that is at issue).

The decision of the Chief Procurement Officer and/or the Department Director are final and is not subject to appeal.

## **11. BID BOND, PAYMENT & PERFORMANCE BOND (Construction)Not Applicable**

## **12. INVOICES**

Vendors must be registered in City of Detroit Vendor Portal and be a registered vendor with the City of Detroit to submit invoices and receive payments. Go to <http://www.detroitmi.gov/Supplier> to register.

**AUTHORIZATION TO COMMENCE WORK OR SHIP GOODS – READ CAREFULLY!!!**

Contractors may begin work or ship goods upon receipt of the required authorization, which is the CPA (Contract Purchase Agreement), in addition to *SPO (Standard Purchase Order)*, from Procurement.



*The CPA (City Council Approved and Awarded Contract Purchase Agreement) alone is NOT authorization to begin work! NO letter of Intent, or Letter to Commence Work will be issued.*

**\*\*Work commencing without issuance of the SPO is subject to Payment Delays and/or Non-Payment! \*\***

**Required contractor steps to invoice:**

- 1) Invoices should NOT be uploaded until the Contractor receives confirmation of review and approval from the City of Detroit.
  
- 2) Vendors should submit their invoices via City of Detroit Vendor Portal. Portal invoice amount and creation date must match the date on attached invoice. Please follow the below invoice requirements:

**Invoice MUST contain or have as attachment:**

- Contractor Name and address on Invoice
- Contact Info on Invoice (Accounts Receivable contact with phone and email)
- Remittance information (MUST be included, or the invoice is subject to rejection)
- City of Detroit contact (person who authorized work to commence)
- Invoice Date
- Date of service/delivery
- Contract number
- Purchase order number
- Total Invoice amount

**Other invoice requirements:**

- Invoice must be billed based on Purchase Order rates
- Total invoice amount must tie to the total supporting documents
- Supporting documentation must be attached to the invoice in the portal

Terms are standard NET 30 Days, unless otherwise negotiated, and start from the invoice receipt date, provided that the invoice is submitted timely to our AP department with the necessary supporting documentation.

If you need assistance, please contact the Office of Departmental Financial Services (ODFS) 313-410-7804.



### **13. PREVIOUS EXPERIENCE**

*Previous experience with the city of Detroit is not a requirement. The City's experience with the bidder on previous contracts will be considered in determining the award.*

### **14. MISCELLANEOUS**

It shall be the responsibility of the Respondent to thoroughly familiarize themselves with the provisions of these specifications. After executing the contract, no consideration will be given to any claim of misunderstanding.

The Respondent agrees to abide by the rules and regulations as prescribed herein by the City as the same now exists or may hereafter from time to time be changed in writing.

**Contractors are encouraged to contract with small and minority businesses, women's business enterprises, labor surplus area firms and Detroit businesses. The City strongly encourages the hiring of Detroit residents whenever possible by contacting Detroit At Work for your hiring needs. Visit the Detroit At Work website at [www.detroitatwork.com](http://www.detroitatwork.com) for specific contact information regarding these opportunities.**

### **15. STANDARD TERMS**

It is the responsibility of the Bidder to review General Conditions located on the City of Detroit's website.

#### **1. GENERAL CONDITIONS**

It is the responsibility of the Bidder to review General Conditions. In your quotation a distinction between dollars and cents must be made. Also, illegible bids may be grounds for rejection of your bid. All changes made to the bid form altering, price, terms, quote and/or conditions. **MUST** be crossed out and initialed. Failure to initial any changes will be grounds for rejection of your bid. **CORRECTION FLUID IS NOT ACCEPTABLE.**

#### **2. LOCAL PREFERENCE CONDITIONS**

It is the responsibility of the Bidder to review the Local Preference Conditions attached to this bid and comply with all requirements therein.

#### **3. MINOR DEVIATIONS**

Specifications referred to herein are used to indicate desired type, and/or construction, and/or operation. Other products and/or services may be offered if deviations from specifications are minor and if all deviations are properly outlined



and stated in the bid document. Failure to outline all deviations will be grounds for rejection of your bid.

The decision of the City of Detroit, acting through the Chief Procurement Officer, shall be final as to what constitutes acceptable deviations from specifications.

**4. RENEWAL**

None

**5. AWARD (multiple)**

One or more Awards will be made on a low bid basis, as determined by the City of Detroit based on contractor's ability and equipment as described in the

specification. Blank spaces on price sheet are considered to be no offer. The City of Detroit reserves the right to delete any item(s) from the award. The City of Detroit reserves the right to limit the amount of the award per contractor.

**5.01 STANDBY AWARD**

The City of Detroit reserves the right to make an award to the second low bidder, on a standby basis. This vendor will be used in the event the successful bidder cannot furnish the quantities and /or services needed in accordance with the delivery requirements of the City of Detroit.

All awards are subject to Ordinance No. 15-00.

**6. TERMINATION OF CONTRACT**

The City reserves the absolute right to terminate this contract in whole or in part, for the convenience of the City at its sole discretion on thirty (30) days written notice to the Vendor.

**7. SPECIFICATION CHECK**

We have read the specifications thoroughly and we:

( ) Are able to meet specifications without deviation.





( ) All deviations are properly outlined on an attached sheet marked \_\_\_\_\_ for identification.

SIGNED: \_\_\_\_\_

TITLE: \_\_\_\_\_

**8. PAYMENT AND PERFORMANCE BOND (Construction bids)**

Not Applicable

**9. STOCKING FACILITY**

Not Applicable

**10. WORK SCHEDULE (if applicable)**

Not Applicable

**11. PRICE**

(If you do not check one of the following, your bid will be considered firm.)

( ) A. Contract prices are not subject to increase but will be subject to reduction. (This will be considered only in case of identical prices offered.)

( ) B. Contract prices are FIRM for the entire contract period.

The City of Detroit reserves the right to cancel the balance of any contract if any proposed increase (in writing) is considered unacceptable.

**12. QUOTING ON**

Not Applicable

**13. ADDITIONAL DISCOUNT**

Not Applicable

**14. LITERATURE**

Not Applicable

**15. SAMPLES**

Not Applicable



**16. TRADE-IN (FORMAL)**

Not Applicable

**17. Pick-Up**

Not Applicable

**18. OPTIONAL ITEMS**

Not Applicable

**19. ORDER QUANTITIES**

Actual quantities ordered will be contingent on funds available at time of purchase. The City of Detroit reserves the right to reduce quantities if price quoted exceeds budgetary limitations or to increase quantities if funds are available.

**20. TERMS OF PAYMENT**

The Contractor must upload invoices into the Oracle System Supplier Portal. After processing invoices, payment is Net 30.

The City of Detroit reserves the unqualified right to reject any bid, which includes a provision for a service charge levied by a vendor when payment by the City is not made within a specified time period.

This paragraph supersedes paragraph 4 of the General Conditions.

**21. INSPECTION**

Not Applicable

**22. F.O.B.**

Not Applicable

**23. DELIVERY**

Not Applicable

**24. DELIVERY**

Not Applicable

**25. ITEMS FOR EVALUATION**

Not Applicable



## **26. CONTAINER CHARGE**

Not Applicable

## **27. REEL CHARGES**

Not Applicable

## **28. ADDITIONAL PURCHASES**

Not Applicable

## **29. BIDDERS QUALIFICATIONS**

Successful bidder encouraged to be established in the State of Michigan. Encourages respondent include team of individuals with the diversity of skill sets necessary to complete all tasks required by this scope of work. Bidder shall have adequate financial resources, organization, and equipment to satisfactorily perform the work to completion within the specified time. Satisfactory evidence of the bidder's ability

to perform including experience and/or resources must be furnished to the City of Detroit upon request.

## **30. CONTRACT ACCEPTANCE**

The successful bidder shall be notified of the execution of a contract by the City of Detroit upon issuance of a "Contract Award Notice" or a Purchase Order. The "Contract Award Notice" shall contain the date the contract award was approved.

The signed, accepted bid of the successful bidder will be the contract between the bidder and the City of Detroit, containing the full description of all contractual terms and conditions. A copy of your signed bid will not be mailed to you. Each bidder shall keep a copy of his/her signed bid form for future reference.

## **31. INSURANCE**

31.01 The Contractor shall maintain at its expense during the term of this contract, the following insurance:

31.01.1 Worker's Compensation insurance with Michigan statutory limits and Employer's Liability insurance with limits of \$500,000.00 each accident, \$500,000.00 each disease, \$500,000.00 each disease/each employee. For Federal and State Funded Training



Programs and etc., is required to secure insurance for worker's compensation for all of its participants and The City of Detroit should also be listed as an additional insured.

- 31.01.2 Commercial General Liability insurance with a combined single limit of \$1,000,000.00 per occurrence subject to a minimum aggregate limit of \$2,000,000.00
- 31.01.3 Automobile Liability insurance covering all owned, hired and non-owned vehicles with personal protection insurance and property protection insurance to comply with the provisions of the Michigan No-Fault Insurance Act, including residual liability insurance with a minimum combined single limit of \$1,000,000.00. Include MCS90 endorsement (if hazardous waste will be transported by vendor's auto) with minimum property damage limits of \$1,000,000.00 each occurrence.
- 31.02 If during the term of this contract, changed conditions or other pertinent factors, should in the reasonable judgment of the City, render inadequate the insurance limits, the Contractor will furnish on demand such additional coverage as may reasonably be required under the circumstances. All such insurance shall be effected at the contractor's expense, under valid and enforceable policies.
- 31.03 All policies shall name the Contractor as the insured and shall be accompanied by a commitment from the insurer that such policies shall not be canceled or reduced without at least thirty (30) days' prior notice to the City. The Commercial General Liability insurance policy shall name the City as an additional insured. Certificates of insurance evidencing such coverage shall be submitted to the Finance Department, Office of Contracting and Procurement, prior to the commencement of performance under this contract and at least fifteen (15) days prior to the expiration dates of expiring policies.



### **32. PERIOD AGREEMENT**

Pricing is FIRM for the contract period. Price lists are subject to superseding manufacturer's price lists and/or supplements.

### **33. BID WITHDRAWAL**

No bid shall be withdrawn for 90 days from submission deadline. Bidders may reduce this period if stated on bid, but such bids may be rejected on the basis of the reduced time period.

This paragraph supersedes paragraph 14 of the General Conditions.

### **34. EXECUTIVE ORDER #2016-2 (Contracts over \$3M General funded):**

Not Applicable

### **35. EXECUTIVE ORDER #2016-2 COMPLIANCE (Contracts over \$3M General funded)**

Not Applicable

### **36. OPTIONAL ITEMS**

Not Applicable

### **37. EQUALIZATION FACTOR**

In accordance with Ordinance No. 15-00, any Detroit based firm shall be deemed a better bid than the bid of any competing firm which is not Detroit-based, whenever the bid of such competing firm shall be equal to or higher than the bid of the Detroit-based firm after the appropriate equalization percentage credit from the Equalization Allowance Table has been applied to the bid of the Detroit-based firm.

The firm making the lowest bid thus evaluated shall be deemed the lowest bidder.

Vendors who wish to receive Equalization credit for bids submitted must fill out the attached Equalization Eligibility Form and return it with their bid document along with any supporting documentation required to substantiate eligibility. The Equalization Eligibility Form and supporting documentation must be submitted with each and every bid response submitted by the vendor. Failure to return the Equalization Eligibility Form and/or Affidavit along with required documentation will result in equalization credit not being applied to your bid.



**38. CLEANLINESS OF THE WORK**

The work itself, and all property used therewith, shall be kept in a neat and orderly condition at all times. Excess waste and rejected materials, rubbish and debris shall not be allowed to accumulate.

**39. EXPERIENCE AND REFERENCES**

Past performance and experience may be factors in making the award.

We have furnished services of a similar nature, as follows (Complete in entirety):

Company	Address	Phone Number	Contact Name

**40. CERTIFIED DETROIT BASED BUSINESS SOLICITATION**

Not Applicable

**41. ALTERNATE BID**

Not Applicable

**42. REMANUFACTURED/REFURBISHED EQUIPMENT**

Not Applicable

**43. PATENTS.**

Not Applicable

**44. DELIVERY TERMS/TIME. F.O.B. delivered prices are preferred. F.O.B.**

Not Applicable

**45. CONTAINER.**

Not Applicable