

REQUEST FOR QUOTES (RFQ)

Tax Preparation and Filing Services

The Workforce Investment Board of Tulare County (WIB) is requesting quotes from highly qualified certified public accounting firms or certified public accountants (CPAs) to provide professional tax preparation and filing services for the WIB's 501(c)(3).

ELIGIBILITY

Entities or individuals possessing the appropriate qualifications, licenses, experience, and demonstrated ability to provide the services outlined in this RFQ are eligible to respond. Responses will be deemed eligible based upon completeness and demonstrated capacity to perform the requested services in this RFQ.

Please note: WIB is prohibited from awarding funds to any entity debarred, suspended, or otherwise excluded from participation in Federal assistance programs in accordance with U.S. Department of Labor (DOL) regulations at 29 CFR Part 98.

Respondents must disclose any actual or potential conflicts of interest that may exist in providing services to the WIB in accordance with applicable federal regulations, including 2 CFR §200.318(c)(1).

BACKGROUND

The WIB is a nonprofit 501(c)(3) organization composed of community leaders appointed by the Tulare County Board of Supervisors and charged with planning and oversight of workforce development programs and services in the County of Tulare.

The majority of the WIB is represented by members of the local business community. In all, the WIB membership includes individuals representing business and industry, economic development, community-based organizations, education, organized labor, State agencies, and more.

The WIB is responsible for administering and overseeing workforce development programs under the Workforce Innovation and Opportunity Act (WIOA). WIOA was signed into law on July 22, 2014, and superseded the Workforce Investment Act (WIA) of 1998.

The WIB provides a comprehensive system of workforce services, including career planning, training, employment assistance, and supportive services for job seekers throughout Tulare County. Businesses look to the WIB and its system of Employment Connection One-Stop Centers for qualified employees, for expertise in job training and supportive services, and for leadership to mobilize public and private organizations to address workforce needs. The WIB's partners and training providers share a desire to work jointly to prepare Tulare County's current

and future workforce by integrating academic, vocational, and social services with workforce development.

Through funding from the US Department of Labor, the State of California, and additional partners, WIB administers an annual budget of over \$18 million. The WIB has extensive experience in managing both WIOA local formula funding and public grants and contracts.

Staff services, program accounting and fiscal management, audit services, and legal services are provided by the County of Tulare through an agreement between the WIB and the Tulare County Board of Supervisors (BOS).

The WIB maintains nonprofit 501(c)(3) status separate from the County of Tulare. Fiscal and accounting support services are provided through an administrative services agreement with the County; however, the selected contractor will be responsible solely for the preparation and filing of applicable nonprofit tax returns and related advisory services. These revenues primarily consist of funding received from a private foundation and have ranged from approximately \$250,000 to \$500,000 annually over the past two fiscal years.

The WIB will provide the selected firm with the necessary financial information and supporting documentation related to these activities. Preparation of audited financial statements, Single Audit services, or tax reporting associated with funds administered under the County of Tulare's tax identification number are excluded from the scope of services.

Respondents are encouraged to review the WIB website at www.tularewib.org to gain a better understanding of the organization and its services.

Additional resources that respondents are encouraged to be familiar with include:

- WIOA, Public Law (Pub. L.) 113-128, enacted July 22, 2014.
- Applicable IRS requirements for nonprofit organizations; and
- Applicable federal and state regulations governing nonprofit organizations and federally funded entities.

FISCAL YEAR INFORMATION

The WIB operates on a fiscal year ending June 30.

The selected contractor will be responsible for the preparation and filing of all required federal and state nonprofit tax filings for the WIB's 501(c)(3) non-profit corporation for the fiscal year ending June 30, 2026.

PROJECT SCOPE

The work to be completed by the awarded contractor includes, but is not limited to, the following:

- Preparation and filing of all applicable federal and state nonprofit tax filings, including but not limited to IRS Form 990 series returns and any required California nonprofit informational returns;
- Review, evaluation, and reconciliation of financial records necessary for accurate tax preparation and filing;
- Coordination with WIB staff and/or County fiscal representatives to obtain required financial documentation and organizational records;
- Identification of any additional filing requirements, compliance concerns, or recommended corrective actions related to nonprofit tax compliance;
- Provision of an estimated project timeline, including milestones and filing deadlines;
- Consultation and technical assistance related to nonprofit tax filing requirements as reasonably necessary during the engagement period;
- Any additional related services deemed necessary by the WIB and/or the WIB Executive Director.

CONTRACT TERM

The anticipated contract term will begin on or about August 1 , 2026 and continue through completion of the required tax preparation and filing services for the applicable fiscal year.

Services are expected to be completed in accordance with all applicable federal and state filing deadlines unless otherwise agreed upon in writing by the WIB.

The WIB reserves the right to extend the agreement for additional years based upon satisfactory performance, continued need, and mutual agreement of both parties.

QUOTE REQUIREMENTS

The submittal must include the following:

1. **Cover Letter**
A cover letter describing the Respondent’s qualifications, relevant experience, organizational structure, and demonstrated ability to provide the requested services. Include the name, address, telephone number, and email address of the individual authorized to submit the quote on behalf of the organization.
(Not to exceed two (2) pages.)
2. **Qualifications and Experience**
Resume(s) or biography(ies) for key personnel who will perform the work, including applicable certifications, licenses, and relevant nonprofit tax preparation experience.
3. **Cost Proposal**
A standard rate sheet and/or fixed fee proposal identifying all anticipated costs associated with the requested services, including hourly rates, project rates, overhead costs, and any additional fees or charges.
4. **Licenses and Certifications**

Proof of active California CPA licensure for the individual(s) responsible for preparing and filing the returns.

5. Conflict of Interest Disclosure

Disclosure of any actual or potential conflicts of interest related to the provision of services under this RFQ.

INSURANCE REQUIREMENTS

The selected contractor may be required to provide proof of insurance, including General Liability and Professional Liability (Errors and Omissions) coverage, with the WIB listed as an additional insured, in amounts acceptable to the WIB, prior to contract execution.

RFQ SCHEDULE

Activity	Date
RFQ Issued	June 24, 2026
Deadline for Questions	July 8, 2026
Quotes Due	July 14, 2026 at 5:00 p.m. PST
Anticipated Contract Start Date	August 1, 2026

The WIB reserves the right to modify this schedule as necessary.

CONDITIONS

1. The WIB reserves the right to reject any and all quotes received or to negotiate separately with any Respondent in any manner necessary to serve the best interest of the WIB.
2. All awards will be based upon fund availability. The WIB reserves the right to terminate or modify any part of this procurement process at any time and for any reason; to award one contract or multiple contracts; to negotiate changes; to make no awards; and to issue new and/or revised policies and clarifications at any time.
3. All response packages become the WIB property. It is understood and agreed that the proposer claims no proprietary rights to the ideas and written materials contained in or attached to its Response package.
4. The WIB reserves the right to negotiate modifications to response packages.
5. The selected contractor must demonstrate the ability to complete all required filings within applicable federal and state filing deadlines.
6. A contract award is not final until a mutually satisfactory agreement has been fully executed by both parties.

EVALUATION PROCESS

All quotes will be reviewed and scored based upon the evaluation criteria published in this RFQ.

The WIB may, at its discretion, request meetings with any Respondents to clarify or negotiate modifications to the quotes. Following the evaluation, the WIB may enter into negotiations with the selected Respondent on final scope, pricing, and contract terms.

EVALUATION CRITERION

Quotes will be scored based on the following criteria:

Criteria	Points
Relevant Experience and Expertise	50
Cost Proposal/Budget	40
Organizational Capacity/Availability	10
Total Possible points	100

SUBMISSION DEADLINE

Quotes must be submitted electronically no later than July 14,2026, at 5:00 p.m. PST.

Please submit quotes with the subject line:

“RFQ – Tax Preparation Services”

Electronic submissions shall be sent to:

WIBProcurement@tualrewib.org

Late submissions may not be considered.

INQUIRIES

Questions regarding this RFQ must be submitted electronically to:

WIBProcurement@tularewib.org

The WIB reserves the right to distribute responses to questions or clarifications to all known Respondents as deemed appropriate.