



Confederated Tribes
of the
Umatilla Indian Reservation

NIXYÁAWII GOVERNANCE CENTER
46411 TIMINE WAY
PENDLETON, OREGON 97801

REQUEST FOR PROPOSAL
Professional Tax Services

Point of Contact:

Bruce Zimmerman, CPA – Tax Administrator (brucezimmerman@ctuir.org)

Critical Dates

RFP Issued	August 18, 2025
RFP Response Due	August 29, 2025
RFP Award – Professional Tax Preparer	September 10, 2025
Tax Preparation Programs Begins	September 15, 2025

Request for Proposals Professional Tax Services

The Confederated Tribes of the Umatilla Indian Reservation (Confederated Tribes) are requesting proposals from qualified business firms or individuals to provide professional tax services. All business firms or individuals submitting responses are referred to as Professional Tax Preparers in this Request for Proposals (RFP). Professional Tax Preparer's response to this RFP will be referred to as Proposals in this RFP.

Background Information

The State of Oregon, acting through the Oregon Department of Human Services (ODHS) has funded a Taxpayer's Assistance Grant Program that emphasizes the need to assist, navigate or educate culturally specific and responsive community-based organizations, Tribal Governments, and under-resourced rural community-based organizations, specifically by helping low-income Taxpayers become aware of tax benefits, navigate the tax system, tax return filing requirements, and assisting with the filing of the tax returns. The Confederated Tribes have been awarded a Taxpayer's Assistance grant.

To implement the ODHS Taxpayer's Assistance grant, the Confederated Tribes request proposals from Professional Tax Preparers. The Professional Tax Preparer will focus on households within the Umatilla Indian Reservation and the households of enrolled tribal members of a federally recognized Indian tribe. Since funding is limited, priority will be given to those: (a) low-income households with dependents that may be eligible for the Earned Income Tax Credit (EITC) and the Child Tax Credit (CTC); (b) low-income and tribal members households 55 years or older with or without dependents; and (c) tribal member households with outstanding federal or state income tax issues.

Taxpayers Assistance Program Project Description

Professional Tax Services to be provided will include the following: A Professional Tax Preparer will meet with the Taxpayer to review, explain, educate, and prepare federal and Oregon tax returns. Services may include, but are not limited to, the following:

- a. Preparation and review of federal and Oregon tax returns;
- b. Electronic filing the tax returns;
- c. Reviewing prior year's tax return and information for errors and omissions;
- d. Filing any prior year tax returns or amended tax returns, when appropriate;
- e. General tax planning and guidance;
- f. Providing the Taxpayer with an understanding of the requirements and documentation necessary for claiming the Earned Income Tax Credit (EITC) and the Child Tax Credits (CTC); and
- g. Providing the Taxpayer with an understanding of the documentation required to support the Schedule OR-EIS (Exempt Income Schedule for Enrolled Members of a Federally Recognized Indian Tribe) exemption form.

Professional Tax Preparer – Proposed Compensation

The overall goal and objective of the ODHS Taxpayer Assistance Grant Program is to prepare and electronically file approximately 100 federal and state individual tax returns. The Professional Tax Preparer will need to provide the following information.

- a. Administrative fee to set up a new Taxpayer client file, including reviewing the prior year federal and state tax returns;
- b. Rate Fee schedule per form for preparing tax returns; identify fee for each form;
- c. Per hour billing rate charge for professional tax services for unique or special circumstances, provided that the services and the associated budget have been approved in advance by the CTUIR Tax Administrator; and
- d. Description of any other professional, administrative or processing fees.
- e. Provide a budget estimate for preparing the following two types of federal and state tax returns:
 - 1. filing as single, including any administrative setup costs; and a review of the prior year tax return filing.

Tax Return No. 1		Tax Return No. 2
W-2		Pension Distribution
1099 - Interest		1099 - Interest
1099 - Tribal Distribution		1099 - Tribal Distribution
Child Care Expenses (2 Dependents)		Social Security Distribution
Earned Income Tax Credit		
Child Tax Credit		
Oregon Exempt Income Schedule for Enrolled Members of a Federally Recognized Tribe		Oregon Exempt Income Schedule for Enrolled Members of a Federally Recognized Tribe

- f. An overall budget estimate for preparing and electronically filing 100 federal and state income tax returns.

Submission Requirements

Proposals should include the following information:

- A.** Experience – Description of the Professional Tax Preparer’s firm and staff’s experience to prepare and electronic file approximately 100 individual federal and Oregon tax returns, including the preparation of Schedule OR-EIS (Exempt Income Schedule for Enrolled Members of a Federally Recognized Indian Tribe) exemption form. (50 points)
- B.** List of all Professional Staff Tax Preparer’s designations and licenses. (20 points)
- C.** Budget – See the Professional Tax Preparer – Compensation Section for the required information needed regarding the proposed budget (i.e., compensation) including identifying any reimbursable expenses or other out-of-pocket expenses. (25 points)
- D.** Indian and (Oregon) Certification Office of Business and Inclusion Diversity (COBID) certified business entities will receive Preference – Qualifying business entities must submit certification documentation. (5 points)

Proposals must be received via email by **Augus 29, 2025, 2:00 p.m.** in a **PDF file format** to brucezimmerman@ctuir.org At the sole discretion of the Confederated Tribes, failed deliveries or late submittals may or may not be considered.

Selection Process

The CTUIR will appoint a selection committee to review and rank the Proposals based on the submission requirements above. The Professional Tax Preparer submitting the highest-ranked Proposal, based on a consensus of the selection committee, will be awarded the project. The Professional Tax Preparer and CTUIR will enter into a professional service agreement for the agreed-upon scope of work after the project is awarded.

Other Information

The Confederated Tribes reserve the right to:

- A.** Amend, modify, or withdraw this RFP;
- B.** Seek clarifications of each Proposal;
- C.** Require supplemental statements or information from a Professional Tax Preparer;
- D.** Extend the deadline for responses to this RFP;
- E.** Accept or reject any and all Proposals pursuant to this RFP, in whole or part;
- F.** Waive or correct any irregularities in Proposals after prior notice to the Professional Tax Preparer;
- G.** Negotiate a final contract that is in the best interest of the CTUIR; and
- H.** Negotiate with alternative Professional Tax Preparers if initial contract negotiations are unsuccessful.

This RFP does not obligate the Confederated Tribes to award a contract, to pay the costs incurred in preparing any Proposal, or to procure the services described herein. All Proposals are submitted at the sole cost and expense of the Professional Tax Preparer. The CTUIR shall incur no liability or obligation to any Professional Tax Preparer except pursuant to a written contract of services duly executed by the Professional Tax Preparer and an authorized signatory for the Confederated Tribes.

Questions and Clarifications

All inquiries relating to the RFP process must be emailed to:

Bruce Zimmerman – brucezimmerman@ctuir.org