



REQUEST FOR PROPOSALS

Issue Date: October 1, 2024

Proposal Due Date: ~~09/29~~ October 29, 2024

Anticipated Award Date: ~~09/12~~ November 12, 2024

To Whom It May Concern:

IREX is an independent nonprofit organization dedicated to building a more just, prosperous, and inclusive world by empowering youth, cultivating leaders, strengthening institutions, and extending access to quality education and information.

IREX (International Research & Exchanges Board) is seeking quotes from qualified respondents to provide nonresident alien tax compliance services. IREX annually brings approximately 2,303¹ foreign nationals to the United States to engage in educational and cultural exchanges. These foreign nationals come to the US on J-1 short and long-term programs and receive non-service scholarships or fellowships. Occasionally, IREX welcomes to the United States B-visa holders for short-term conferences, too.

The anticipated award will be a service contract. IREX reserves the right to withdraw this request for proposal at any time up to the award of the contract.

Proposal Requirements

Organizations interested in providing this service must submit a proposal, including a breakdown of costs, which demonstrates the organization's capacity to:

- Prepare forms W-8 BEN and Substitute W-4, as applicable.
- Prepare and submit forms W-7 (ITIN applications) on behalf of foreign nationals.
- Calculate tax withholding (IREX pays tax on behalf of foreign nationals).
- Prepare and distribute forms 1042-S to foreign nationals.
- File forms 1042-S with the IRS.
- Prepare form 1042 on IREX's behalf.
- Prepare and file state and federal tax returns on behalf of foreign nationals.
- Provide access to a support center, hotline, or other resources to assist foreign nationals in the tax compliance process.
- Facilitate collection of tax refunds, as applicable.

¹ 2,303 foreign nationals is an estimate for RFP purposes. It is the number of foreign nationals funded by IREX programs in Calendar Year 2023. IREX does not guarantee this number will stay the same as it is contingent upon federal funding.

- Provide general consulting services on nonresident alien tax compliance (current and prior years).

Key Qualifications

- Proposed consultant should have more than 5 years of experience with United States federal and state tax compliance.
- Proposed consultant should have more than 5 years of experience providing nonresident alien tax compliance and filing services.
- Proposed consultant should have more than 5 years of experience with filing for J and B visa holders and non-service scholarship/fellowships.
- Proposed consultant should have experience working with iNGOs implementing US government grants, cooperative agreements, and contracts.
- Proposed consultant should have experience communicating with IRS on behalf of its client.
- Preference will be given to applicants with experience working with multiple clients on similar projects.
- Preference will be given to applicants with experience working with/offering software and/or online tax management system.

Application Submission Instructions

To simplify the review process and obtain the maximum degree of comparability, the proposal should include the following items and be organized in the manner specified below:

- A. Cover Letter: include a cover letter briefly outlining an understanding of the work in the RFP and general information regarding the firm/consultant to be involved. This section is limited to a maximum of five pages.
 - a. Profile of Firm/Consultant:
 - i. Provide a brief profile of the firm/consultant.
 - ii. State whether the firm/consultant is a local, national, or international firm/consultant and include a brief description of the size of the firm.
 - iii. State whether the firm/consultant is in compliance with the relevant registration and permit requirements to work in the District of Columbia.
 - iv. Describe the local office from which the work is to be performed:
 1. Location of the office,
 2. Current size of the office,
 3. Size of progression staff by level, such as partner, manager/supervisor, senior, and other professional staff.

- v. Any other information required to describe the firm/consultant that will be performing the requested services.
- b. Scope of Services and Proposed Project Schedule:
 - i. Briefly describe the firm/consultant's understanding of the scope of services to be provided.
 - ii. Indicate a proposed time schedule for completing the work, including approximate dates for key milestones.
 - iii. Briefly describe the firm/consultant's system of quality control to ensure the work is adequately performed.
 - iv. Describe the firm/consultant's policy on notifications of changes in key personnel, if any.
- c. Fees and Compensation:
 - i. Provide the breakdown of the fee schedule, based on the requested services detailed for 2,303 foreign nationals.
 - ii. Explain the frequency and timing of the firm/consultant's billing process.
- B. Resume(s): include a resume for the proposed key personnel which should contain the information specified below:
 - a. Qualifications:
 - i. Describe the level of experience with nonresident alien tax compliance.
 - ii. Describe recent experience with similar work to which the proposal relates. If appropriate, include experience with similar clients.
 - iii. Include a summary of similar projects the consultant has worked on and their role(s).
- C. References: include three recent references from clients that have used the firm/consultant's nonresident alien tax services.

Proposal Submission

If you are interested in furnishing this service, please e-mail a proposal to YRivas@irex.org with subject Non-Resident Alien Tax Procurement 2024. If you decide to submit a proposal, it must be received no later than 5:00 p.m. Eastern Standard Time on the closing date indicated above. Late submissions will only be considered if in the best interest of the project, and then, at IREX's sole discretion. All proposals submitted must be valid for a period of no less than sixty (60) calendar days from the closing date indicated above.

Proposal Evaluation

The criteria are listed below in descending order, starting with the most important factors to be evaluated.

- Scope of services provided
- Organizational capacity
- Overall price competitiveness
- Flexibility and customer service
- Experience working with international non-profit organizations and international students and scholars in a similar capacity
- Past references

Evaluation and ranking of proposals will be done by IREX in Washington, DC. IREX may, at its discretion, ask for additional information.

Renewal

IREX reserves the right, based on availability of funding and vendor performance, to enter into subsequent contractual agreements with the winning vendor for a period of up to three years without issuing a new RFP.

Contact Information

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