

Robert P. Astorino
County Executive

Department of Social Services
Kevin M. McGuire, Commissioner

17254

DATE: February 8, 2011

TO: Honorable Members of the Board of Acquisition and Contract

FROM: Kevin M. McGuire, Commissioner
Department of Social Services

SUBJECT: Authority to enter into an agreement with each of two (2) agencies to promote, coordinate, and operate the County's five (5) sites for the 2011 Volunteer Income Tax Assistance program for a total aggregate amount not-to-exceed \$50,000 to be paid pursuant to approved budgets for a term from January 1, 2011 through May 31, 2011

Authority is respectfully requested from your Honorable Board for the County of Westchester (the "County"), acting by and through its Department of Social Services (the "Department"), acting on behalf of the Westchester-Putnam Local Workforce Investment Board ("WPWIB"), to enter into an agreement with each of the two (2) agencies listed below to promote, coordinate, and operate the County's five (5) sites for the 2011 Volunteer Income Tax Assistance program for the respective tax sites listed below, for a total aggregate amount not-to-exceed \$50,000 and in the respective amounts not-to-exceed set forth below, to be paid pursuant to approved budgets, for a term from January 1, 2011 through May 31, 2011:

<u>Agency</u>	<u>NTE Amount</u>	<u>Tax Sites</u>
1.) Westchester Community Opportunity Program, Inc.	\$40,000	Yonkers, White Plains, Mt. Vernon
2.) Interfaith Council for Action, Inc.	\$10,000	Ossining, Peekskill

For the past several years, the Department has been managing a group of volunteers who help prepare taxes for Westchester County residents under the Volunteer Income Tax Assistance program, in order to help residents take advantage of the Earned Income Tax Credit ("EITC"). This year, the County will be managing five (5) tax sites, which are located in White Plains, Yonkers, Mt. Vernon, Peekskill and Ossining. The EITC is a refundable Federal/State tax credit for eligible individuals and families who work and have income that falls below the specified level. The EITC reduces the amount of tax one owes and may result in significant tax refunds for those most in need. In addition to EITC, the program helps qualified families apply for other tax credits such as the Child Tax credit, Education credits, Elderly credits and Dependent Child

Care credits.

In accordance with Section 6 of the Westchester County Procurement Policy, on November 12, 2010, the Department issued a Request for Proposals (“RFP”) for tax coordinators to manage and supervise one or more of the aforementioned five (5) tax sites. Tax coordinator services will include, but not be limited to, recruitment, staffing, training, customer service, marketing & promotion, site management and tax preparation. The RFP was e-mailed to various private sector businesses, training providers, WIB Directors, community and faith-based organizations. The RFP was also posted on the County’s website and a legal notice was posted in the Journal News. Pursuant to the RFP, the County had the right “to enter into an agreement for only portions (or not to enter into an agreement for any) of the services contemplated by the proposals with one or more of the Proposers. Proposals in response to the RFP were due on December 1, 2010.

The Department received a total of two (2) proposals, from: Westchester Community Opportunity Program, Inc. (“WestCOP”) and Interfaith Council for Action, Inc. (“IFCA”). The proposals were reviewed independently by Yesinia Detona, IRS; William White, AARP and Pat Anderson, United Way 211 and the summary of their scores are shown below:

The proposals were reviewed independently by Yesinia Detona, IRS; William White, AARP and Pat Anderson, United Way 211 and the summary of their scores are shown below:

Agency/Organization	Amount Awarded	Yencina Detonia	William White	Pat Anderson	Average Score
1. IFCA	\$10,000	81	88	85	85
2. WestCOP	\$40,000	87	88	66	80

After a careful review of each proposal with reference to the evaluation criteria set forth in the RFP, both vendors were selected to perform different parts of the services solicited by the RFP, based upon their respective proposals. Under the terms of the proposed agreements, WestCOP will promote, coordinate, and operate the Yonkers, White Plains and Mt. Vernon sites. The IFCA will promote, coordinate, and operate the Ossining and Peekskill sites.

Agency	Amount Awarded	Yencina Detonia	William White	Pat Anderson	Average Score
IFCA	\$10,000	81	88	85	85
WestCOP	\$40,000	87	88	66	80

The proposed agreements will serve a public purpose by giving residents the assistance they need in preparing their taxes to avail themselves of the EITC and thereby provide such residents with an income supplement to help them achieve self-sufficiency.

The goals and objectives of the proposed agreements are to prepare 1,300 Federal and State returns as follows:

Agency	Tax Sites for 2011	Number of returns to be filed
IFCA	Ossining, Peekskill	400

WestCOP	White Plains, Mt. Vernon, and Yonkers	900
---------	--	-----

The goals and objectives of the proposed agreements are in the best interests of the County in terms of fiscal responsibility because EITC dollars have a significant impact on the lives of low and moderate income families by providing an income supplement to meet the immediate expense of qualifying families, to achieve economic self-sufficiency and break the cycle of poverty.

The program was successful in its operation in 2010 and the selected vendors exceeded their targets under their respective contracts in 2010 as indicated below:

Agency	Tax Sites for 2010	Number of returns to be filed	Actual Number of returns filed 2010
IFCA	Ossining	300	321
WestCOP	White Plains, Mt. Vernon, Peekskill and Yonkers	800	1210

The goals and objectives of the proposed agreements will be tracked and monitored through reports to be prepared by the selected agencies. The agencies will report on the number of returns filed, the amount of tax refunds and the amount of EITC and other tax credits.

An appropriate resolution is herewith attached for your Honorable Board's consideration.

APPROVED BOARD OF ACQUISITION & CONTRACT - 3-10-2011 - JOMARY VIEIRA, SECRETARY

RESOLUTION

Upon a communication from the Commissioner of the Department of Social Services, be it hereby

RESOLVED, that the County of Westchester (the "County") is hereby authorized to enter into an agreement with each of the two (2) agencies listed below to promote, coordinate, and operate the County's five (5) sites for the 2011 Volunteer Income Tax Assistance program for the respective tax sites listed below, for a total aggregate amount not-to-exceed \$50,000 and in the respective amounts not-to-exceed set forth below to be paid pursuant to approved budgets, for a term from January 1, 2011 through May 31, 2011:

<u>Agency</u>	<u>NTE Amount</u>	<u>Tax Sites</u>
1.) Westchester Community Opportunity Program, Inc.	\$40,000	Yonkers, White Plains, Mt. Vernon
2.) Interfaith Council for Action, Inc.	\$10,000	Ossining, Peekskill

; and be it further

RESOLVED, that the County Executive or his duly authorized designee is empowered to execute all documents and take all actions necessary to effect the purpose of this resolution.

Account to be
Charged/Credited

Fund	Dept	Major Program, Program & Phase Or Unit	Object/ Sub- Object	Trust Account	Dollars
101	22	5000	4420	----	\$50,000

Budget Funding Year(s): 2011 Start Date: 01/01/11 End Date: 05/31/2011

(Must match resolution)

Funding Source

Tax Dollars: 41%

State Aid: 36%

\$50,000

Federal Aid: 23%

(Must match resolution)

Other: _____