

Robert P. Astorino  
County Executive

Department of Social Services  
Kevin M. McGuire, Commissioner

**26598**

**DATE:** May 1, 2012

**TO:** Honorable Members of the Board of Acquisition and Contract

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

**SUBJECT:** Authority to enter into agreement with each of the two (2) agencies listed below to promote, coordinate, and operate the County's six(6) sites for the 2012 Volunteer Income Tax Assistance program, for a total aggregate amount not-to-exceed \$95,000 to be paid pursuant to approved budgets for a term from January 1, 2012 through December 31,2012

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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"), on behalf of the Westchester-Putnam Local Workforce Investment Board ("WPWIB"), to enter into agreements with each of the two (2) agencies listed below to promote, coordinate, and operate the County's six(6) sites for the 2012 Volunteer Income Tax Assistance program for the respective tax sites listed below, for a total aggregate amount not-to-exceed \$95,000 and in the respective amounts not-to-exceed as set forth below to be paid pursuant to approved budgets for a term January 1, 2012 through December 31, 2012:

<u>Agency</u>	<u>NTE Amount</u>	<u>Tax Sites</u>
1.) Westchester Community Opportunity Program, Inc.	\$85,000	Yonkers, White Plains, Mt. Vernon Valhalla
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 six (6) tax sites, which are located in White Plains, Yonkers, Mt. Vernon, Peekskill, Valhalla 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 30, 2011, the Department issued a Request for Proposals (“RFP”) for tax coordinators to manage and supervise one or more of the aforementioned six (6) tax sites. Tax coordinator services will include, but not be limited to, recruitment, staffing, training, customer service, marketing & promotion, site management and tax preparation. Proposals in response to the RFP were due December 19, 2011.

The Department received a total of two (2) proposals, from: Westchester Community Opportunity Program, Inc. (“WestCOP”) and Interfaith Council for Action, Inc. (“IFCA”). Pursuant to the RFP, each proposer was to “submit a proposal on how they will manage one or more of the Westchester Tax sites.” 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, Valhalla, White Plains and Mt. Vernon sites. The IFCA will promote, coordinate, and operate the Ossining and Peekskill sites.

<b>Agency/Organization</b>	<b>Amount Awarded</b>	<b>Yencina Detonia</b>	<b>Johnny Nelson</b>	<b>Pat Anderson</b>	<b>Average Score</b>
1. IFCA	\$10,000	84	94	83	<b>87</b>
2. WestCOP	\$85,000	98	94	89	<b>93</b>

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:

<b>Agency</b>	<b>Tax Sites for 2012</b>	<b>Number of returns to be filed</b>
IFCA	Ossining, Peekskill	400
WestCOP	White Plains, Mt. Vernon, Yonkers , Valhalla	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 Department is pleased to report that both vendors met their targets under the 2011 agreements.

<b>Agency</b>	<b>Tax Sites for 2011</b>	<b>Proposed number of returns to be filed.</b>	<b>Number of returns filed</b>
IFCA	Ossining, Peekskill	400	401
WestCOP	White Plains, Mt. Vernon, and Yonkers	950	1122

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 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 & CONSTRUCTION 05/31/2012 JONATHAN 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 six(6) sites for the 2012 Volunteer Income Tax Assistance program for the respective tax sites listed below, for a total aggregate amount not-to-exceed \$95,000 and in the respective amounts not-to-exceed set forth below, to be paid pursuant to approved budgets, for a term January 1, 2012 through December 31 2012;

<u>Agency</u>	<u>NTE Amount</u>	<u>Tax Sites</u>
1.) Westchester Community Opportunity Program, Inc.	\$85,000	Yonkers, White Plains, Mt. Vernon Valhalla
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
275	22	174M	7340	T174	\$45,000
101	22	5000	4420	-----	\$50,000

Budget Funding Year(s):2012 Start Date: 01/01/12 End Date: 12/31/2012

(Must match resolution)

Funding Source

	<u>4420</u>	<u>T174</u>
Tax Dollars:	29%	
State Aid:	27%	
<b><u>\$95,000</u></b>	Federal Aid: 44%	
<u>(Must match resolution)</u>	Other:	100%