



## **Notice of Participation in Innovative Tax Preparation Program for Low-Income Filers**

### **Non-Competitive Solicitation**

**Due November 6, 2009**

The Department of Consumer Affairs Office of Financial Empowerment (OFE) seeks to expand the delivery of free tax preparation services throughout the City of New York by identifying appropriate sites that can serve as venues for an innovative and free online tax preparation platform.

This is a non-competitive solicitation with no funding attached.

Staffing at selected sites will be provided by OFE's Implementation Partners ("Partner"), who will be selected through another solicitation process. Depending on anticipated volume, site applicants are also encouraged to provide additional support, including equipment and staffing. Government agencies, nonprofit organizations, community-based organizations, and private entities are welcome to submit an application.

The program will offer free tax preparation services through One Economy Corporation's Beehive Tax Tool that allows users to prepare and electronically file their returns, including both federal and state returns. OFE anticipates that the service will be provided at multiple venues. The process requires a client to have: (1) a valid e-mail address; (2) Adjusted Gross Income of less than \$58,000 (both families and singles); and (3) a valid Social Security Number or Individual Taxpayer Identification Number.

Clients will use the free online preparation tool that allows them to prepare their returns in one of two ways: (1) with limited assistance from a roving tax coach who is working with several clients at the same time; or (2) with one-on-one attention from a tax coach who will oversee the process as clients complete their own return. Site partners will work directly with Implementation Partner to coordinate staffing and day-to-day activities.

OFE is seeking to integrate this service at high-volume locations. Selected sites will benefit from the addition to their roster of services of a tax preparation package. This includes access to an online tax preparation tool and staff to assist clients through the tax preparation process. There will be no charges for this package but interested parties should assess internal costs to host such a tax preparation service. Sites will either be designated as "Public," available to all eligible New Yorkers through the City's 311 non-emergency call center and the OFE Web site; or "Closed," available only through the site and Partner referrals.

Desirable sites will provide sufficient room to host at least 6-8 computer terminals, wireless capability, and printing stations that will allow self-directed filers to prepare their taxes via the online tool (with the assistance of an OFE-provided tax coach), submit an e-file form and print a completed version. Ideally, the site will have sufficient computers; however, OFE will be able to provide equipment (laptops and printers) if necessary.

Site Partners must:

- Ensure a large volume of clients can be accommodated if it is listed as a “Public” site.
- Ensure a steady flow of clients can be served if it is a “Closed” site.
- Have consistent and secure Internet connectivity.
- Ensure locations have ample ADA compliant entrances, space, furniture, and restrooms for waiting customers.
- Ensure security for equipment during business hours and overnight.
- Ensure a good mix of operating hours (including evenings and weekends) to accommodate a range of working individuals.
- Develop a contingency plan if there is an impact on service, e.g., weather-related events, technical difficulties, etc.
- Work with the selected Implementation Partner to facilitate on-site data collection.

OFE anticipates visiting certain sites prior to making a final selection and reserves the right to request additional information. The anticipated program period will be January 15, 2010 - April 15, 2010. Selected sites must be available to both OFE and Partner staff in December and early January as the program is being readied.

Please direct all inquiries to Tamara Lindsay, Program Officer, at [tlindsay@dca.nyc.gov](mailto:tlindsay@dca.nyc.gov) or 212-487-2749.

**SEE SITE APPLICATION ATTACHED.**

# Online Tax Preparation Pilot Program Site Application

Please submit complete application plus all supporting documents to Tamara Lindsay by November 6, 2009 at:

[tlindsay@dca.nyc.gov](mailto:tlindsay@dca.nyc.gov) **OR** Tamara Lindsay  
Department of Consumer Affairs Office of Financial Empowerment  
42 Broadway, 8<sup>th</sup> Floor  
New York, NY 10004

The City will not provide any reimbursement for the cost of developing or presenting proposals in response to this Solicitation. Failure to include the requested information will have a negative impact on the evaluation of the applicant's proposal.

If more writing space is needed, please send all requested information in a separate document.

Organization Name: _____
Address: _____
Telephone: _____ Fax: _____
Primary Contact Person & Title: _____
E-mail: _____

## Organization/Agency/Entity Mission:

\_\_\_\_\_  
\_\_\_\_\_

*Provide a brief description of planned tax preparation site for the 2010 tax season.*

## SITE 1

Name/Address/Neighborhood: \_\_\_\_\_  
\_\_\_\_\_

Estimated number of people visiting the site (weekly): \_\_\_\_\_

Was this site a tax site (VITA, Tax Prep Plus, etc.) in 2008 or 2009?      Yes       No

If Yes, number of filers in 2008 and/or 2009: \_\_\_\_\_

Anticipated number of filers in 2010: \_\_\_\_\_

Please describe the available space for tax preparation: \_\_\_\_\_

Will this site be (please check one):           “Public”                    or                   “Closed”

*If “Closed,” please describe the target population and assurance for volume:* \_\_\_\_\_

Anticipated Operating Hours:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Please describe anticipated population served (age, race/ethnicity, income):

\_\_\_\_\_  
\_\_\_\_\_

Will the site provide computers? \_\_\_\_\_

- *If yes, how many?* \_\_\_\_\_
- *If no, can this site accommodate 6 to 8 laptop stations?* \_\_\_\_\_

Is there additional equipment available (printers, copiers)? \_\_\_\_\_

- *If yes, please describe:* \_\_\_\_\_

Please provide details on Internet connectivity at this site: \_\_\_\_\_

Do you anticipate hiring or assigning additional staff for this program? \_\_\_\_\_

- *If yes, how many?* \_\_\_\_\_

Please describe security for equipment during business hours: \_\_\_\_\_

\_\_\_\_\_

Please list any challenges you anticipate implementing the program at this site: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please describe marketing opportunities and strategies to attract filers and/or engage existing clients:

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**PLEASE ATTACH ADDITIONAL SITE DESCRIPTIONS FOR EACH PROPOSED SITE.**