

Transcript

July 1, 2025, 5:58PM

MJ **McWilliams, Jessica (DCWP)** 3:33

All right.
Good afternoon, everyone.
Can everyone hear me OK?
Hmm.

SE **Schiff, Erik** 3:40

Yes.

MJ **McWilliams, Jessica (DCWP)** 3:41

Awesome. Thank you.
All right.
So welcome to the Department of Consumer and Worker protections, pre proposal conference for the annual tech season initiative RFP.
So thank you so much for being here today.
We're very glad you could join us to get started.
We'd like to 1st go over some housekeeping rules. So first please hold your questions for the end of the Q question and answer session, which will begin after the presentation.
Please do not enter any questions in the chat until the question and answer session.
We will not be taking any questions during the presentation.
Next, we ask that everyone please remain muted throughout the presentation.
It helps to limit distraction and ensure that all the presenters can be heard clearly and then lastly, please keep in mind that any issues with the passport system will need to be addressed with the Mayor's Office of Contract Services.
The presentation includes information on contacting the MOX helpdesk. We'd like to thank everyone for their attendance today and their cooperation.
And now let's review the agenda.
Next slide please.
So we'll start things off with the RFP timeline and then we'll move into the passport resources and overview.

After that, we'll cover program expectations, followed by a review of post award requirements. And then lastly, we'll conclude with the question and answer session. So now I'll be passing it over to Eric Schiff, agency chief contracting officer at DCWP, for the RFP timeline.

SE Schiff, Erik 5:10

Good afternoon all. The next slide please.

Next slide.

All right. The RFP timeline, the anticipated contract term for this contract shall be July 1, 2026 to June 30, 2029 with 2-3 year renewal options.

The proposal due date will be August 15th, 2025 at 2:00 PM with hopefully an award announcement within the fall winter season of 2025.

All questions must be received by August 11, 2025.

All questions will need to be addressed in the discussion forum in passport in the solicitation rfx through passport. I will also like to preface it that when submitting a proposal, all proposals must be submitted through passport as we will not accept hard copies or emailed copies of PROPOS.

Next slide please.

Passport resources in overview. Next slide.

Yep, we're going to go over passport resources and some tips to learning how to use passport. Next slide.

For those of you who aren't aware, passport.

Is a tool that all city agencies, mayoral, city agencies and some non mayoral agencies utilize.

To procure good services release RFP solicitation.

Process contract proposals, evaluations where we evaluate them and award contracts.

Through this lovely system.

If you ever need any assistance with passport, you would need to have the contact mocks directly as we are not the the keepers of the system and if we have issues we have to go through passport ourselves, we have to go through mocks as well to get a.

Ticket resolved.

And you could always go to mock.

You could always go to NYC.

Dot Gov forward slash passport or you could go to.

Forward slash forward slash Gov and you could go directly to their page.

In the resources you have the option here to create an account to review and respond to opportunities and search any other opportunities throughout the public portal.

You could also use this as a training tool as we have.

This system has a lot of frequently asked questions, has a lot of.

Things and it helps and it's a good uh guide to help you navigate the system. Next slide.

Learn to use password, so if you go to the Mach Gov and you go through the passport system, you would see this page here where you could also find resource libraries.

Again, frequently asked trainings and most importantly the trainings the training tool is very helpful and will help you navigate passport efficiently. And again if you have any issues you would have to contact.

Marc's directly.

Umm in here.

You could also access user guides video, one pagers, umm HHS accelerator to passport, Quick guide and learning courses and webinars, and more.

Next slide.

Submission instructions responses must be submitted electronically utilizing the passport system. If vendors have questions, you would need to respond to the RFP, then submit a ticket with the Mocks help desk.

Again, responses must be completed and submitted in passport by no later than 2:00 PM on August 15th, 2025. This will be set to auto closure, so anything after that will not be allowed to be submitted.

Please allow submission time to complete and submit responses which includes entering information and uploading documents.

The passport system will only allow propulsion to submit proposals prior to the due date and time, unless the agency issues a written addendum, which may happen from time to time with Rfp's that extends the proposal due date and time for all proposals. The due date shall remain.

In effect, please next slide.

HHS and the PQL in passport. So if you haven't done so already, you would need to take the following steps to complete the HHS accelerator pre qualification

application in passport you can navigate to rfx at the top of the menu and you could browse to pql list from.

Drop down or pre Qualifi qualified list.

Uh click create a new application.

Uh at the top of the page complete the questionnaire.

Upload any required documentation and click submit for review and then the vendor, admin or procurement level 2 whoever you designated from your company will have to sign and submit the application and uh for mox's review. You would also have to ensure that you have assigned a VE.

Procurement level one.

Vendor procurement level 2.

And a vendor admin.

Uh please, next slide.

Here is a brief overview of some of the things that I just went over right now.

You see, number one, it's where you receive your e-mail notification of the approved status.

This is when your pql has been approved.

If you did all the documentation everything correctly, you would get this e-mail and you would see the change in your proof status with box one with box 2 when reviewing. Mox Approvers can return the application.

To the vendor for revisions. Uh, you'll receive again a notification through passport, telling them that it was returned and they would tell you the reason why three would give providers to see their application status has changed to returned and application history. Section provider #4 providers can return.

The application make updates and resubmit for review and #5 once the application is approved application status.

To approved change to approve.

So I will preface it that it may take a day for changes to reflect in real time a lot of the emails that come in. You'll get those in real time. But passport, I believe, takes a day to update all of its statuses.

So if you do everything correctly and MOX hasn't proved it, you may not see it till the next day.

Next slide please.

Checking your pql status, uh, you may view your HHS.

Accelerator pre qualification status in passport following the next steps.

Again, navigate to Rfx top of the navigation menu and select browse pre qualified list from the drop down.

Search for HHS accelerator pre qualifications. You will see the results to the current status for that particular pql.

Additionally, you may click the Pql label and you'll be able to see more pql related information, including the status current status.

As it relates to the HHSPQL in the same section.

You can't see your expiration date, which will be uh. I'll be glad.

No, I'll go over in the next slide. So please next slide.

So pre qualification renewals and expirations pql is only good for up to three years or if the documents that were submitted with the pql are valid.

If your documents expire within the three-year term of your pql, you will go from active to approve to expire.

So we'll show you some steps and some things for you to go over to get yourself re approved.

The pql's are valid for up to three years or until document expires, whichever occurs first. If the documentation expires, pql changes OK as provider.

Submit proposals to the RFX in passport.

They will be asked to validate and confirm their pql information is correct.

This restarts the clock on the approved status moving expiration date to three years after the proposal submission date.

So that's a good date for you to remember.

Users can find their pql status and additional history section of the application under the application History tab. Next slide, please.

Updating your pql when documentation or information needs updating or replacing to make updates to an approved application provider should click the update application button located at the top of the screen of the application right there.

Upon clicking new application is created under a new unique application ID. That's for tracking purposes to upload new to upload. New documentation providers can go to documents tab and click upload new version.

Button.

Once click the version number changes from A1 to A2 and reflects the update.

Providers then can Click to save and close buttons to finish uploading the document.

Once you have submitted all your documentations to the application, you could hit submit for review. Next slide please.

Any questions with that you get any error messages?

Anything precluding you from submitting successfully, you should go to the MOX helpdesk and this is what that page would look like.

This is their service desk and you'll get an automated ticket from them for all passport related issues. So and that's everything and anything.

I mean we could guide, we could try and help you find an issue that may help.

That may be hurting you submitting, but.

The best bet is always go to.

The Mark's help desk and the link is provided below. Next slide please.

OK, program expectations. I am going to pass it over to Gracemarie Luis, director of programs here at DCWP.

LM **Louis, Grace Marie (DCWP)** 15:44

Thanks Eric.

Alright, next slide please.

So the annual tax season initiative mission, the tax time can be a crucial money moment for families and individuals with low incomes.

Tax refunds can be the largest cash infusion or paycheck a family receives all year, but tax preparation fees average \$322 in New York City and cost of up to \$800 or more are not uncommon, eroding the value of these critical fund.

The annual tax season initiative after this helps just the initiative.

Has three goals.

First, increase the availability and usage of high quality free tax preparation services in New York City.

Two, increase the number of eligible New Yorkers claiming the EITC and other valuable tax credits.

Through the city's annual tax season initiative and three use tax time as an opportunity to build assets among New Yorkers with low and moderate income, thereby improving their financial health. Next slide, please.

NYC free tax prep is the primary activity of the initiative, making free tax preparation services available in person and online for New Yorkers earning less than 60% of area median income or AMI NYC free tax prep services are based on the Internal Revenue Service IRS volunteer income.

Tax assistance and tax counseling for the elderly.

Vida TCe programs.

In 2023, NYC free tax prep for self-employed filers was launched to serve self-employed New Yorkers.

Including freelancers, gig workers for higher drivers and small business owners who often struggle to file taxes and manage financial record keeping and who face limited access to capital, banking services and loans.

Next slide please.

For this RFP, there are two competition pools, competition pool number one is for the NYC free tax prep for individuals and Families program only and competition pool two is for NYC free tax prep for individuals and families and NYC free tax prep for self-employed filers.

Total maximum available funding is \$14,419,844.00 for three years or \$4,806,628.00 annually, and the estimated number of contracts is approximately 7 or more.

Contracts ranging from no less than two.

\$150,000 to no more than \$1.5 million annually.

Dcwp reserves the right to award more or less than the full amount.

Funding requested by proposers, please next slide.

For service delivery and competition pool one, NYC free tax prep offers free high quality tax preparation services and it's part of that contractors are expected to complete and file 3500 to 220 thousand tax returns annually.

Prepare individual taxpayer identification number or I-10 applications and renewals as part of the IRS certified acceptance agent or CAA program.

Assistant clients with tax EXE.

Mpt, taxation and finance, also known as Nysdtf correspondence, requesting transfers, etc.

Next slide please.

For competition Pool 2, service delivery includes contractors are expected to complete and file 3500 to 20,000 tax returns annually across both service lines and scopes of service.

Please see RFP attachment C the setp scope of services for more details on the scopes of service.

They are expected to prepare individual taxpayer identification number, or I-10 applications and renewals as part of the IRS certified acceptance agent or CAA Program assist clients with tax related issues, such as responding to IRS in New York, State Department Taxation and finance nysetf correspondence requesting transcripts ET.

As well as offering year round, educational and support programs for self-employed filers, including the preparation of quarterly.

Estimated tax filings one-on-one and small group consultations on record keeping and tax filing obligations and group workshops on record keeping and tax filing obligations. Next slide please.

For both competition pools, sites, scheduling and appointment expectations.

Contractors operate one or more sites with a focus on serving neighborhoods of highest need.

Please feed the RFP attachment B preferred neighborhoods For more information on those neighborhoods.

Sites must be convenient and accessible for people with disabilities.

Be equipped with standard modern technology and offer secured storage space and provide safe, well weather protected waiting area for clients and allow appropriate privacy for tax preparers and clients to meet.

Contractors may subcontract with pre approval or collocate services to reach target audiences.

Ofe may mandate locations with with key partners.

Please see the RFP for more details.

At least 15% of services must be offered during evening and weekend hours. At least one site must be open at least one day a week, year round.

Appointments will be available by phone or online scheduling using a centralized online scheduling system managed by DCWP. If it is available.

Preference will be given to proposers who offer some capacity for walk in appointment. Next slide please.

For both competition pools wrap around services and referrals to help tax filers optimize their tax refund, begin to build assets and develop financial capabilities.

Contractors connect text filers to wrap around services, including financial counseling, public benefits such as snap screening and or enrollment.

Promoting asset building behaviors, such as using direct deposit for receiving tax refunds and encouraging tax filers to save a portion of their refund.

Access to safe and affordable financial services like savings accounts and for competition pool 2.

Connection to NYC Business Solutions centers and other department of Small Business Services programs.

Contractors must train and support staff and volunteers on applicable IRS and New

York State Department of Taxation and finance forms and on effective strategies for engaging filers.

Next slide please.

Organization, staffing and management for competition Pool 2. The required dedicated staff.

Include full time year round tax program manager to supervise the program and act as a primary point of contact.

Site coordinators or coordinator to oversee each site during all hours of operation, and a volunteer program manager to oversee volunteer recruitment, training and retention.

Please see the RFP for details on these dedicated staff.

Members next slide please.

Continuing on organization staffing and management for competition Pool 2 to ensure high quality and high volume of tax preparation services, contractors are expected to recruit and hire seasonal tax preparers, including paid staff and volunteers.

The expected staffing level, the number of tax preparers needed to is the number of tax preparers needed to achieve the annual return completion goal at the rate of one return per preparer for each hour of service.

For volunteer engagement to make the best experts to recruit enough volunteers so that 50% of the contractual return goal can be completed by volunteers.

With language skills, contractors will make best efforts to recruit multilingual tax preparers to meet the language needs of their neighborhoods. Based on the NYC Department of City Planning data.

And for creating and certification, all tax preparers must complete and pass required IRS standards of conduct, ethics and tax law exams.

Next slide please.

Moving to organization staffing and management for competition Pool 2, the required dedicated staff include again a full time year round tax program manager to supervise the program and act as a point of contact.

Site coordinator or coordinators to oversee each site during all hours of operation.

A volunteer program manager to oversee volunteer recruitment, training and retention, and at least one enrolled agent.

Certified public accountant or licensed attorney to oversee tax return preparation for self-employed filers. Please see the RFP for details on these dedicated staff members.

Next slide please.

Like or again for competition pool two, continuing on organization staffing and management to include ensure both high quality and high volume of tax preparation services. Contractors are expected to recruit and hire seasonal tax tax preparers including paid staff and volunteers.

The expected staffing levels.

Are calculated by the number of tax preparers needed to achieve performance goals at the following rates.

For the individual families, individuals and families side of the service, that is one return per preparer for each hour of service.

And for the services for self-employed filers, that is for four hours per annual tax return, two hours per quarterly estimated filing, five hours per workshop and two hours per consultation.

Volunteer engagement contractors are expected to make best efforts to recruit enough volunteers so that 1550% of the contractual return goal can be completed by volunteers.

Language skills contractors will make best efforts to recruit multilingual tax preparers to meet the language needs of their neighborhoods based on NYC Department of City Planning data and training and certification.

All tax preparers must complete and pass required IRS standards of conduct, ethics and tasla exams with all self-employed tax prep tax preparers qualifying at the advanced level or higher.

Next slide please.

Communications and outreach for both competition pools in order to reach New Yorkers that may be eligible for free tax preparation services. Contractors will target outreach and marketing efforts to the following audiences, individuals and families with low and moderate incomes, working individuals and families living below the poverty line.

Tax filers who are currently using paid tax preparers and are likely to request loan products such as.

Such as refund anticipation checks or racks.

Individuals and families who are eligible for the EITC earned income tax credit.

Individuals and families who might be eligible for the EITC but are not likely to file a tax return, such as single workers who don't have kids.

Families with very low incomes, foster parents and recent immigrants.

And for competition pool 2, self-employed filers, contractors are expected to conduct their own marketing and outreach activities to augment the campaign run by dcwp and participate in events with DCWP. Next slide, please.

Monitoring and reporting for both competition pools.

Contractors will report on performance metrics and client demographics through reports to dcwp based on an annual reporting schedule, reporting and performance management activities include biweekly or weekly reports during the tax season, regular conference calls and monitoring and evaluation via site visits, interviews, surveys and other data collection next.

Slide please.

Contractor experience and organizational capability for both competition pools.

Contractors are expected to have the experience in organizational capability to manage a free tax preparation program, including at least three years experience operating a Vita TC program or a similar direct service program in New York City. Experience working in one or more communities with low or moderate incomes in New York City.

Experience conducting effective client outreach using multiple marketing and outreach tools and cultivating partnerships with community leaders to build a high volume client base.

Experience engaging volunteers in support of direct service programs and experience recruiting, training and managing direct service program staff.

Next slide please.

Budget management for both competition pools, contractors project proposed budget will represent the annual cost to provide services for each year of the proposed program over the duration of the contract term. Contractors cost will would allow for the effective delivery of services described in the RFP, the annual CONT.

Amount cannot exceed 40% of the contractor's total organizational income for the program year.

In the case where a portion of the budget is going to the to a subcontractor.

The sub granted amount must not exceed 40% of the subcontractor's organizational's income and would not count towards the lead contractor's 40% limit.

Next slide please.

Evaluating the proposals.

Proposals will be evaluated using the following criteria.

Free tax preparation services, 30 points, communications and outreach, 20 points.

Monitoring and reporting, 15 points. Contractor experience and organizational capability.

20 points budget management 15 points.

Next slide please.

Passing it back to you, Eric for post award requirements.

SE **Schiff, Erik** 30:46

Thank you so much.

I'm back folks.

Hope we're all having a great time.

OK.

So we're gonna go over some the post award requirements when we.

Are finalizing a contract. Some things that we do is what is called a responsibility determination, OK. A responsibility. Determination is an in depth check on your company via many sites.

Google Department of Finance.

And we just checked the charities Bureau.

And a few others that we go through and.

You know, please be advised that this is a requirement for all.

Contractors to be determined responsible in the post award phase.

So we we ask you to please make sure that your charity filings are up to date and current and that any outstanding liens or any adverse information has been disclosed.

In your passport disclosures and thoroughly umm.

Referenced attachments, you know any anything that.

You guys got resolved.

An unresolved issue often can cause significant delays in the post award process and may even deny you the contract because.

You know, it wasn't disclosed at the right time trying to fix it and just not enough time to get the contract registered. Next slide please.

Please.

Insurance requirements OK.

This is pretty straightforward.

With you'll be asked to provide us with some insurance certificate accord.

ING, which I'm pretty sure that you're aware of, is the general liability insurance city of New York states.

That has to be 1,000,000 per occurrence and two million per aggregate motor vehicle liability if applicable, 1,000,000 per accident combined.

Singles limit.

Workers comp.

Another one that's very standard disability benefits and insurance and employers liability. Those are all pretty standard out if you already do business in the city of New York, very familiar with.

Professional liability insurance 1,000,000 per current if indicated in the schedule A.

Schedule A is one of the documents that would be submitted with the proposals, and you'll have a full view of all that.

Dcw.

P will not be able to process or proceed with an awarded contract until it has obtained.

Accept acceptable proof of the necessary insurance coverage.

D Cwp may also reserve the right to notify the contractors of additional insurance requirements that we may need at the time of contract award.

Please next slide.

Now conflict of interest.

This is a lot of information to go over here.

So this will this, it will be provided to you.

This presentation will be on our website along with the transcript and everything.

All of this I don't know if you can make the screen bigger so we could show the lovely folks.

DR **Duncan, Ryan** 34:15

And I think that's gonna work.

SE **Schiff, Erik** 34:15

OK, OK.

No, that's fine.

I.

I have.

I have another one open up here. Then I'm running off of.

I'll just go over some finer points.

This, this these numbers may change, but in the human section in the Human Services contract section of this you should be able to find the corresponding #605. To what the the conference the conflict might be like, you'll scroll 605 and you'll see the Board of Directors.

To size composition rule against employee supervising or making decisions about family members.

What the contract must say, employees and members of their immediate families may not serve on the board or any committee with authority to affect his or her job or employment of any kind.

Candidates in the program. The above rule does not apply if the board member the board has more than five members, provided that one employee and the members. Their media family are prohibited from deliberation and or voting on such personal matters and must fully disclose all conflicts to the board and to contractor employees and members.

All of the immediate families may not serve as either chairperson or treasurer on the board.

Nor will constitute more than 1/3 of board any committee.

No person may hold job with the contractor if their immediate family.

Exercises any authority over him or her without the permission of the Commissioner. Unless the position is voluntary and unpaid, so this this is a whole bunch of conflicts that we have seen in contracts before.

And this is just a brief list of some that you might come across again.

The top left bar, the blue bar, is where you gonna find it in the Human Services contract.

And then the section number and then the subject will be there.

You'll be able to see it more clearly.

In the presentation, the final presentation, next slide.

Please.

All right, now we open the floor to you.

The the what?

You all been waiting for the question and answer section.

Please use the chat to ask questions you may have about the RFP requirements, the proposal process, DCW dcwp staff will answer the best as we can.

MJ McWilliams, Jessica (DCWP) 37:05

Thanks Eric and Grace for their presentation.

I just want to remind folks, so please use the chat to share your questions.

We'll use the remainder of the time that we have together to answer any questions that you might have. Anything that we can answer today will be addressed in an addenda to the RFP and posted in passport.

OK.

So our first question is, can another government agency provide a reference or references? So we're confirming receipt of your question.

It has been noted and we will follow up in response to an addenda that will be posted on passport.

And we have a second question.

What is the average per return payment anticipated under the contract? OK. And so we're confirming receipt of your question, Irene, and it has been noted and we will follow up with a response in an addenda that will be posted on passport.

And then noting a third question, is there a template for reference letters?

Eric, do you want to take the reference letter question?

SE Schiff, Erik 38:21

Hi, yeah.

Uh, we could.

Most certainly we have a reference letter template. We could most certainly provide that.

I think we didn't.

We provide that in.

We will be providing that within the release of the RFP. It'll be one of the.

Blank documentations that will be submitted with the RFP. So when you submit your proposal, there's a section for you to upload your references as well.

And you could use that document.

MJ McWilliams, Jessica (DCWP) 38:48

Thank you.

Right. And we have another question.

Does it matter how long ago the applicant organization had experience running a

Vita TCe program?

And do the three years need to be consecutive?

So we have confirming receipt of your question.

It has been noted and we will follow up with a response and an addenda that will be posted on passport.

Our next question related to Itins, that situation is extremely volatile at the moment and many non profits working with immigrants have suspended their I-10 programs.

Are you requiring all contractors to operate an I-10 program given that reality?

All right. So we are confirming receipt of your question and has been noted and we'll follow up with a response and an addenda that will be posted on passport.

OK. And can an elected official serve as a reference?

So, Carla, we're confirming receipt of your question.

It's been noted and we will follow up with a response in an addenda that will be posted on passport.

OK, what if we run a CPA firm but haven't done Vita?

Is it worth applying?

We do work with low income people for over three years though.

OK.

Somya, we are confirming receipt of your question.

It has been noted and we will follow up with the response and an addenda that will be posted on passport.

Is there an allowed administrative overhead or indirect rate?

So Ken, we're confirming receipt of your question.

It has been noted and we'll follow up with a response in an addenda that will be posted on passport.

Really appreciate everyone's questions. You know, please continue to submit them in the chat.

We'll give folks a few more minutes to digest the presentation you know, and take additional questions as as needed.

OK.

Next question is, will each Bo receive at least one contract award?

So Ken, just noting your question confirming receipt, it has been noted and we will follow up with a response and an addenda to be posted on passport.

And then from Addie, is there an estimated date by which will receive the Q&A addendum?

We're aiming for to have that posted by next week. Addie.

Of course.

OK.

Also just want to share as Eric mentioned at the beginning of the presentation, this is not your only opportunity to ask questions.

You can ask questions through the discussion forum and passport and you'll see that at the beginning of the presentation that you can use the discussion forum as well to submit questions about the RFP in case there's anything that comes up after today.

We'll give folks a few more minutes.

And Ryan, you can go to the next slide in the meantime.

OK.

All right. So as we are just waiting to see if there's any additional questions from our participants, just wanted to share that a transcript, the presentation and attendance rosters from today's pre proposal conference will be posted to the DCWP website.

And you can see the link there. So just so you're all aware everything from today's meeting will be accessible for you for future reference.

OK, so I think we'll give it another minute or so to get any last minute questions in.

And then as we wait for those, just want to thank everyone for attending today. We really appreciate your questions and your participation and your interest in the RFP.

So yeah, if.

We don't see you again.

Enjoy the rest of your day.

OK, looks like we have an additional question.

Will preference be given to organizations that provide matching funds?

So Ken, confirming receipt of your question, it has been noted and we will follow up with response and an addenda to be posted on passport.

And we have an additional question, will contracted organizations be required to provide referrals to clients who request other services?

IE non tax prep services.

So Ken, we're confirming receipt of your question and it's been noted and we will follow up with the response and an addenda that will be posted on passport.

OK, so I think we have answered all of the questions. So I just want to thank everyone again for joining us today. And as a reminder, the transcript of this meeting, the presentation deck that you all saw and attendance rosters will be posted to the Dcwp

website and.

Thanks again for joining us today. Take care.

□ stopped transcription