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**PROGRAM:** El Centro de Amistad Panorama City Family Source Center (FSC)

**PROGRAM OVERVIEW:**

El Centro de Amistad Manages the Panorama City Family Source Center (FSC). The FSC is funded by the City of Los Angeles Housing + Community Investment Family Department (CIFD) through Federal, State, and local funds, and serves as the City’s delivery system for anti-poverty initiatives and essential social services. The FSC is a one-stop shop center that provides a continuum of core services designed to financially empower poor, very low-income families to become more self-sufficient by increasing family income through the provision of asset-building programs and also to prepare low-income youth to graduate from high school and qualify for post-secondary education.

**SUB-CONTRACTOR BID SOLICITATION:**

El Centro de Amistad is seeking bids to subcontract with qualified organizations that are skilled and experienced in providing VITA services for the Panorama City Family Source Center.

**SOURCES OF FUNDS AND FUNDING REQUEST:**

The primary funding sourced for this bid are a combination of Community Development Block Grant, Community Services Block Grant, and City General Funds.

**ANTICIPATED TERMS OF CONTRACT:**

The anticipated terms of the Family Source contract are December 1, 2024, through June 30, 2025 with an option to extend for an additional one-year term.

**SCOPE OF WORK:**

El Centro de Amistad is seeking a subcontractor that can provide VITA services. The subcontractor should have a minimum of five years of experience providing VITA or similar services.

**DELIVERABLES:**

El Centro de Amistad is seeking the following deliverables:

1. **VITA SITE MANAGEMENT**

* Initiate and develop relationships with Internal Revenue Service (IRS) Stakeholder Partnerships, Education and Communication (SPEC) representatives.
* Register the electronic filling application with the IRS.
* Adhere to the IRS requirements for quality tax preparation, timely filing, and monthly reporting.
* Notify IRS of tax preparation schedule, locations, services provided, names, addresses, and certification level of volunteers, and volunteer hours, at least once a month.
* Order and manage tax preparation software from IRS and TaxSlayer.
* Manage all user accounts, specifically for Admins, E-filer, and Tax preparer’s accounts, on the TaxSlayer software and MyFreeTaxes.com.
* Contact TaxSlayer during software outages, resetting passwords, adding or deleting user accounts, etc.
* Configure internet explore settings for optimum security.
* Set-up and manage TaxSlayer defaults in adherence to IRS regulations.
* Administer online volunteer registration software to recruit and schedule volunteers.
* Provide telephone operator services to schedule client’s tax appointments and inform documentation requirements for their appointment.

1. VITA SERVICES

* Provide two (2) .6 FTE bilingual Spanish speaking staff to oversee volunteer recruitment, training, schedule tax services, and ensure quality tax preparation service to be provided on-site at El Centro de Amistad Panorama Family Source Center.
* Train volunteers in preparation of passing the Volunteer Basic and Intermediate level certification; TaxSlayer and customer service/site-specific training.
* Deliver and distribute all IRS authorized training materials.
* Serve as direct contact for all volunteers, schedule volunteers, and all other volunteer management responsibilities (i.e., collect volunteer certification, record volunteer hours/contributions, provide social network and events).
* Serve as direct contact for all tax clients and all income tax preparation-related responsibilities (i.e., manage all tax documents and successful submission of all tax files) at no charge to the tax client.
* Manage volunteers in adherence to IRS volunteer guidelines.
* Prepare tax returns for a minimum of 300 El Centro de Amistad customers and secure copies of filed tax returns reflecting the State and/or Federal tax credit OR a Tax Assistance Exit Survey to support outcome credits totaling in the amount of $250,000.
* Compile and provide a monthly report to El Centro de Amistad with the total number of returns prepare and accepted, total dollar amounts of credits (Earned Income Credit, Child Tax Credit, and other Tax Credits) and refunds, and other aggregate data from the 300 City of Los Angeles tax clients.
* Train El Centro de Amistad staff on Tax Prep processes, eligibility, and other requirements set by the IRS. Training will also include reviewing tax forms for refunds and tax credits.

Each proposer will be required to meet the minimum quantitative Performance Measures:

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| --- | --- |
| PERFORMANCE MEASURES | ANNUAL PERFORMANCE GOALS |
| Minimum # of Unduplicated Clients to be Served | 300 |

**ELIGIBLE BIDDERS (Threshold Requirements):**

Eligible bidders are invited to submit proposals indicating their interest in this project. Bids will be accepted only from community-based, non-profit organizations that meet the following criteria. Bidders must meet the following criteria to be eligible:

1. Be qualified to conduct business in the State of California as evidenced by the organization’s business registration with the California Secretary of State.
2. Be in good standing with the Secretary of State if a corporation or limited liability company.
3. Have not been determined to be non-responsible or been disbarred by the City pursuant to the Contractor Responsibility Ordinance.
4. Have not been disbarred by the federal government, State of California, or local government.
5. Have a minimum of five (5) years’ continuous experience providing services comparable to those solicited herein.
6. Not have any outstanding debt which has not been repaid or for which a department agreement plan has not been implemented, if the proposer has previously contracted with the State of California or the City of Los Angeles. If it has contracted with the CIFD, it must not have any outstanding disallowed costs or other liability to the City, or on corrective action for the current fiscal year.
7. No have conflict of interest with any parties involved in this contract, either through the awarding of this contract or through the provision and receipt of services.
8. Disclosure of any political contributions to City Officials.

**BID PROPOSALS:**

Bidders shall include three brief program narratives that describe their demonstrated ability and program design, as well as budget forms that detail costs associated with the project. Narratives are not to exceed two pages. Budget forms do not count toward the two-page limit. All bids are to include a budget of **$50,000.**

**NARRATIVE 1 -DEMONSTRATED ABILITY (10 POINTS)**

* Describe your organization background and experience in successfully providing VITA services to low-and moderate-income individuals/families as outlined in the scope of work, within the last five (5) years.

**NARRATIVE 2 – PROGRAM DESIGN (10 POINTS)**

* Describe your proposed program design to meet the performance measures outlined in the scope of work.

**NARRATIVE 3 – COST REASONABLENESS, LEVERAGED RESOURCES, AND FINANCIAL VIABILITY**

**(10 POINTS)**

* Provide a brief narrative summarizing your financial stability based on your agency’s past 24-month financial statements. This may include but not be limited to balance sheets or statements of financial position, statement of income, and statement of cash flow.
* Using the following Budget Forms: Budget Summary, Schedule of Personnel Costs, Budget Detail, Spending Plan Worksheet, and Budget Narrative, describe in detail your proposed costs in providing your proposed scope of work for a 6-month funding period of 1/1/24-6/30/24.
* Any staff funded in whole or in part of these grant funds, shall be paid a salary that is consistent with the FSC Program because, as the City’s anti-poverty program, it does not align with the Family Source System’s vision of lifting families out of poverty.
* Also include any non-federal Matching/Leveraged Resources/Funds.

**EVALUATION CRITERIA:**

Bids will be evaluated and rated from 1-30 points based on the bid package submitted.

**IMPORTANT DATES:**

Bid Release: May 31, 2024

Bid Submission Deadline: June 20, 2024

Responses will be evaluated and a notice to proceed will be effective no later than: June 26, 2024

**SUBMISSION ADDRESS:**

Please submit a written proposal by email to the attention of:

Carina Campos, El Centro de Amistad FSC Program Manager

[carina.c@ecda.org](mailto:carina.c@ecda.org)

**Include: VITA Services Bid in the subject line of email**

All Bids must be received by June 20, 2024. Bids must be signed and dated to be considered.

If selected, your agency will require a copy of the BTRC, proof of insurance, including liability and Worker’s Compensation, and registration in the System of Award Management (SAM), among other things.

**QUESTIONS OR TECHNICAL ASSISTANCE:**

Contract:

Carina Campos

Email: [carina.c@ecda.org](mailto:carina.c@ecda.org)