

United Way of Tucson and Southern Arizona



Impact Target RFP Specifications VITA / Asset Development for Family Financial Stability

Significant Dates

RFP release date: December 7th

Mandatory Pre-applications conference: December 14th 3-5 pm. RSVP to Chris McNamara at 903-9000 x: 198 or cmcnamara@unitedwaytucson.org

Submittal deadline: December 28th

Date of notification: January 5th

Commencement date: January 19^h

Impact Target	Increase the number of families and individuals who receive free tax preparation services and access to other asset development tools at Volunteer Income Tax Assistance (VITA) sites.
Arenas of Action for funding in FY 2007-2008 VITA locations	<ul style="list-style-type: none"> • The Earned Income Tax Credit is one of the most significant tools for helping low- and moderate-wage workers become more self sufficient. • VITA participants can be linked to other asset development tools at VITA sites to further increase income, build savings, and gain and sustain assets. These could include accessing public benefits, financial education, splitting their tax refunds, signing up for traditional banking accounts and enrolling in Individual Development Accounts (IDA's).

**EITC Task Force
Purpose
(rationale for
the RFP)**

The Strengthening Families Impact Council and the Earned Income Tax Credit Taskforce is issuing this Request For Proposals for a pilot program aimed at increasing program sustainability and access to asset development tools at VITA sites. The RFP will fund VITA sites to purchase equipment and supplies, purchase Nets-to-Ladders software, work with VITA consumers to split tax refunds into multiple bank accounts, screen for public benefits, promote financial education, open bank accounts, and open IDA accounts. The RFP will permit the applicant to develop a budget. Acceptable costs would include: equipment and supplies, Nets-to-Ladders software, site coordinator stipends and contracting with financial education partners. The RFP could fund a stipend for the site coordinator(s) at each of the 4 pilot sites because research shows that by providing modest stipends to the site coordinators could better lead asset development volunteers and activities that we will increase accountability and sustainability at those sites. By implementing this program at only a few sites we will be able to evaluate the effectiveness of providing these resources and then look to make this potentially a VITA-wide program in subsequent years.

Due to current funding availability, United Way has decided to increase asset development opportunities as a mechanism for increasing family financial stability and have a more sustained impact on our community. If this program proves to be successful it will have the potential to open new funding opportunities in the future to expand and improve the quality of the EITC program.

RESPONSIBILITIES:

United Way and the EITC Task Force will be responsible for the following: posting the application on the CTK website; providing payment(s); providing a policy/procedure guide to the sites on reporting and tracking requirements; measurements tools such as surveys and tracking worksheets; facilitating relationships with banks, financial education partners, IDA accounts, DES, and other Nets-to-Ladders partners; continue to recruit volunteers; marketing; access to

Nets-to-Ladders software; laptops for Nets-to-Ladders software.

Awarded sites will be responsible for the following:

- Incorporating Asset-development into the proposed VITA site through the following:
 - Promotion of asset-development techniques to consumers at VITA sites through an individualized assistance process
 - Utilization of Nets 2 Ladders software for enrolling families into bank accounts
 - Benefits screening through Arizona Self Help.Org
 - Promotion of financial education services through a creative process that will increase the uptake of services and enrollment at sites
 - Enrollment of eligible families into IDA accounts as permitted by the City of Tucson
 - Application assistance for public benefits support
 - Promotion, explanation and enrollment of consumers in split refunds at VITA sites
- Supervision of asset-development specialists. Ensure team approach to VITA coordination.
- Reporting on all asset development activities and using all measurements tools provided by United Way and the EITC Task Force - including, but not limited to: customer satisfaction surveys, pre-screening/pre-preparation surveys, volunteer tax preparer satisfaction surveys, and referral tracking.
- Continued responsibility for the day-to-day management of their sites, including oversight of asset-development specialists, volunteer recruitment and scheduling of translators, greeters, tax preparers, establishing a site contact for logistical purposes (opening and

	<p>locking site, printers, etc.); room(s)/table(s) for asset development materials, presentations, and outreach; internet access for laptops; training asset development specialist(s) for using Nets-to-Ladders software; paying for the licensing/user fees from the award; office supplies needed beyond the scope of traditional VITA site management; distributing all referral information; sign up clients for financial education classes and other programs; and attend all EITC Task Force and other scheduled meetings.</p>
<p>Proposal Review</p>	<p>Proposals will be reviewed by EITC Task Force members that have not applied and have no Conflict of Interest in result of selection process. Recommendations for approval will be sent to Strengthening Families Impact Council for formal approval. If there is an insufficient number of Task Force members able to review proposals (as determined by the SFIC), then the SFIC, or subcommittee thereof, will review the proposals and award grantees. There are 33 current members on the EITC Task Force.</p>
<p>Outcome Measurements</p>	<p>United Way of Tucson and Southern Arizona will provide summary worksheets for data tracking.</p> <p>These are some of the outcomes we are interested in measuring, including but not limited to:</p> <ul style="list-style-type: none"> • # of referrals to financial education classes/workshops • # of IDA's opened • # of referrals to DES programs (AHCCCS, Food Stamps, Etc.) • # of referrals to Small Business Development Workshops • # clients screened on Arizonaselfhelp.org or BEN / # of applications submitted from screenings

	<ul style="list-style-type: none"> • # referred to / enrolled in KidsCare • # of split refunds
<p>Applicant Requirements / Questions</p>	<ul style="list-style-type: none"> • Eligibility: <ul style="list-style-type: none"> ○ Applicant organization must qualify as tax deductible under 170(c) such as a 501(c)(3). Organizations may include churches, religious institutions, neighborhood groups, governmental agencies and programs of governmental agencies. ○ Applicant must be an existing EITC task force member ○ Applicant must have a site coordinator procured by January 7th 2007, or organization will be disqualified and funds will be dispersed to different organization. ○ Applicant must agree to administer all asset-development requirements as listed above ○ Site contact, site coordinator(s) and asset development volunteers must agree to participate in meetings with United Way EITC staff and the EITC taskforce as needed. ○ Volunteers will need to participate in Nets-to-Ladders training ○ Submit bi-monthly output reports to United Way staff. • Proposal requirements <ul style="list-style-type: none"> ○ Applicant must submit a line-item Budget Proposal <ul style="list-style-type: none"> ▪ Acceptable costs would include: equipment and supplies, Nets-to-Ladders software, site coordinator stipends and contracting

	<p style="text-align: center;">with financial education partners.</p> <ul style="list-style-type: none"> o Applicant must submit an on-line application with information pertaining to: <ul style="list-style-type: none"> ▪ the number of tax returns prepared at the site last year (returning sites only How many committed volunteers do you have at the site? ▪ Availability of internet access? Is there internet access for benefits screening? ▪ The amount of space for an asset development? ▪ The demographics that the site serves ▪ The goal number of tax returns for the site? ▪ The proposed method of incorporating financial education into the sites? (United Way will help facilitate potential partnerships with current United Way financial education partners) ▪ How will you conduct outreach to increase participation in VITA?
Potential dollars available	<p>\$20,000 (up to 4 sites will be awarded up to \$5,000 each). Up to one new site and up to three existing sites will be funded. Distribution of awards will be determined on a case-by-case basis.</p>
One Year Funding Only	<p>Funding for this pilot project will be for one year only.</p>
EITC Task Force 2007-2008 priorities for VITA/Asset Development	<p>The Earned Income Tax Credit Task Force will review all proposals.</p> <p>Successful proposals will demonstrate a strong commitment to the VITA program and have the ability to</p>

funding	incorporate asset development into their sites. Participating sites must be willing to attend additional meetings to evaluate program successes and opportunities during and after the tax season.
Impact Target Contact Person	Chris McNamara Program Manager, Family Financial Stability 903-9000 ext. 198 cmcnamara@unitedwaytucson.org
Additional Resources:	<ul style="list-style-type: none"> • National Community Tax Coalition (www.tax-coalition.org) • Center for Economic Progress (www.centerforprogress.org) • Center on Budget and Policy Priorities (www.cbpp.org/eic2007)