

**Department of Family and Support Services
Human Services Division
2024 Scope of Services ~ Tax Prep Chicago
January 1, 2024 – December 31, 2024**

A Delegate Agency receiving an award from the City of Chicago Department of Family and Support Services (DFSS) Human Services Division must complete and submit all required documents as requested in the Award Notice letter:

<u>Submit to Program Coordinator:</u>	<u>Submit to Contract Liaison:</u>
1) Scope of Services 2) Budget 3) Indirect Cost Letter 4) Lease Agreement(s)	1) Agreement Signature Page 2) Current Certificate of Insurance 3) Economic Disclosure Statements (EDS) Certificate of Filing

PROGRAM MODEL: TAX PREP CHICAGO

AGENCY INFORMATION

ADMINISTRATIVE CONTACT INFORMATION

Agency Name: _____

Address: _____

Program Director Name: _____ Phone # (ext): _____ Email: _____	Reporting Contact Name: _____ Phone # (ext): _____ Email: _____
Executive Director Name: _____ Phone # (ext): _____ Email: _____	Fiscal Contact Name: _____ Phone # (ext): _____ Email: _____

BUDGET ALLOCATION

Budget Term: January 1, 2024 – December 31, 2024

Program Name: _____

PO Number: _____

Grant Amount: _____

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SECTION A – GOALS AND OBJECTIVES

Program Goals

The goal of Tax Prep Chicago is to increase financial stability among low-income Chicagoans by increasing the number of residents who maximize the financial benefits of income tax filing, particularly by claiming the federal Earned Income Tax Credit (EITC), federal Child Tax Credit (CTC), and state Earned Income Credit (EIC) and by avoiding Refund Anticipation Check (RAC) fees. This will be accomplished by providing free, accessible tax preparation and filing services and deploying an outreach campaign to increase awareness of tax credit entitlements and free tax preparation services, as well as other mainstream banking and financial stability services.

Using tax preparation assistance programs, clients save on private tax preparation fees, which can cost anywhere from \$90 to \$250 depending upon the number of tax forms used. Chicagoans that use a paid tax preparer but cannot pay for the service upfront often opt for a RAC, a temporary bank account set up by paid tax preparers, into which the IRS deposits the tax refund.

Target Population

EITC and CTC income eligibility guidelines are established by the IRS for each tax year, and vary depending on filing status and if children are claimed.

SECTION B – PERFORMANCE MEASUREMENT

Overview

DFSS is committed to moving beyond measuring *how many* people receive services, to focus on whether Chicago residents are *better off* after receiving services. As part of this outcome-oriented approach, DFSS has implemented a Strategic Framework that guides how the department measures, reports on, and reviews its priorities and outcome goals, and uses them to drive contracting, improve decision-making, and encourage greater collaboration.

Performance Measures

To track progress toward achieving our goal and assess success of the program, DFSS will monitor a set of performance measures that may include but are not limited to:

- Number of tax preparation services provided from January through Tax Day, April 15.
- Number of federal EITC filers that also file for the Illinois EIC.
- Number of tax preparation sites.
- Number of tax returns filed by tax site.
- Dollar value of refunds received.
- Number of referrals to additional mainstream banking and financial stability services.

Data Reporting

Delegate agency is expected to collect and share data with DFSS according to the format, frequency, and submission protocol specified by DFSS. The parties recognize that reliable and relevant data is necessary to create a common understanding of performance trends, ensure compliance, evaluate program results and performance, and drive program improvements and policy decisions. As such, DFSS reserves the right to request/collect other key data and metrics from delegate agencies, including client-level demographic, performance, and service data in a format specified by DFSS.

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Delegate agency must provide weekly status reports during the tax season from the start of service in January through the tax deadline to include number of tax returns prepared, tax credit claims filed, and refund and tax credit dollars secured, with monthly reports thereafter.

Data Usage

Delegate agencies must implement policies and procedures to ensure privacy and confidentiality of client records for both paper files and electronic databases. Delegate agencies must have the ability to submit reports electronically to DFSS. The City's Information Security and Information Technology Policies are located at https://www.cityofchicago.org/city/en/depts/doi/supp_info/is-and-it-policies.html.

Meeting

Regular reviews of and conversations around program performances, program results and program data, particularly related to the goals outlined in this agreement, will allow DFSS and the delegate agency to employ real-time information to track performance, identify good practices, and swiftly, collaboratively, and effectively address any challenges experienced by the target population.

At such meetings, the data will be reviewed to:

- Monitor progress, highlight accomplishments, and identify concerns;
- Collaboratively design and implement operational changes to continuously improve processes and outcomes; and
- Develop strategies to broader system changes to improve service delivery and coordination between services.

Meetings shall include the DFSS Human Services Division Deputy Commissioner, or designee, and the delegate agency's chief executive officer, or designee. Delegate agency and DFSS may be represented by additional representatives as each party deems appropriate.

SECTION C – CORE ELEMENTS

Program Requirements

Organizational requirements:

- Delegate agency must be a currently approved IRS VITA provider.
- Delegate agency must be a not-for-profit organization, as evidenced by incorporation in the State of Illinois, and must have federal 501(c)(3) tax-exempt designation.
- Overall fiscal soundness is required as evidenced by the financial history and record of the respondent, as well as the most recent audited financial statements (or the equivalent).
- Delegate agency must secure additional funding to support the program and ensure that funds may be expended prior to reimbursement.
- Delegate agency must fulfill necessary staffing (paid and volunteer) to execute the program, including, but not limited to: program oversight, program management/coordination, volunteer recruitment/management, data/IT oversight, site management, intake, and tax preparation and filing.
- All staff and volunteers must complete an IRS-approved training
- Delegate agency must have a secure data base to protect participants personal identifiable information the ability to submit reports electronically to DFSS. The City's minimum requirements, responsibilities and acceptable behaviors required to establish and maintain

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a secured technology environment can be found here

https://www.cityofchicago.org/city/en/depts/doi/supp_info/is-and-it-policies.html.

- Delegate agency must provide services to Chicago residents within the City of Chicago.

Tax preparation requirements:

- Provide free tax preparation services, both in-person and virtual, to at least 15,000 clients.
- Provide technical assistance/support to clients accessing virtual services.
- Ensure that federal EITC filers also file for the Illinois EIC.
- Provide services throughout the tax season (from January through Tax Day April 15).
- Partner with at least twenty sites to provide in-person services at locations accessible by car and public transportation within the city of Chicago. Site hours may vary by site, but must accommodate clients outside of the traditional work schedule, including weekends.
- Services may be appointment-based, depending on space and any relevant public health regulations at the time.
- Implement secure method for obtaining, reviewing, and storing client documents.
- Provide services to people with limited English proficiency.
- Provide services in community areas where there are a significant number of residents whose primary language is Spanish, Mandarin or Cantonese, or Polish in the language of that community in addition to English.
- Provide access to services to people with disabilities.
- Make referrals to additional mainstream banking and financial stability services.
- Provide a mechanism for client feedback on program satisfaction and quality.

Recruitment

- Develop and execute a plan for recruiting and training at least 700 volunteers.
- Develop and execute an internship program that supports the volunteer gap in needed labor hours and prepares students for careers in accounting and finance.
- Manage taxprepchicago.org website.

Outreach Campaign

- Outreach strategies should include, but is not limited to flyers, digital billboards, social media, and distribution of informational material.
- Develop and implement public relations/marketing approaches for participant recruitment that leverage strategic partnerships and target geographic areas and populations specified by DFSS, including non-filers, those newly eligible for the state EIC, and low-income community areas.
- Demonstrate partnerships with organizations that provide mainstream banking and financial stability, and strategies for connecting clients to these services.
- Develop new outreach materials to drive awareness of expanded EIC eligibility and benefit levels for tax year 2024 and beyond.
- Develop outreach materials in English, Spanish, Chinese (Traditional and Simplified), and Polish and provide services in the community areas where those languages are commonly spoken through partnerships with organizations that provide services to those communities.
- In partnership with stakeholders, develop and implement public information campaign to increase awareness of benefits of income tax filing, mainstream banking, and other financial stability programs (e.g. financial coaching, mainstream banking services) and connect clients to these services.
- Convene and distribute information and outreach materials community partners during the tax season as appropriate.

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DESCRIPTION OF PROGRAM AND ACTIVITIES

Provide a program summary describing your program model operating at full capacity to both address the needs of the target population and maximize performance outcomes. If relevant, describe coordination and interface with other partners and programs.

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SECTION D – SUBMITTAL AND APPROVAL

ACKNOWLEDGEMENT

By checking this box your agency certifies that it has read and understands Sections A, B, C, and D of this document.

a) Applicant signature <i>(Original must be signed in blue ink)</i>	
b) Name (typed)	
c) Date submitted	
d) DFSS Staff signature	
e) Name (typed)	
f) Date approved	