



The Florida Senate

Local Funding Initiative Request - Fiscal Year 2018-2019

1. **Title of Project:** Tax Preparation Assistance

2. **Senate Sponsor:** Audrey Gibson

3. **Date of Submission:** 12/07/2017

4. **Project/Program Description:**

Provides a Financial Literacy and Prosperity Program/Economic Development Program to help working families recoup their hard-earned money. Provides more than 30,000 low-to-moderate income working Floridians with income tax consulting and preparation assistance, saving them up to \$2.7 million in tax preparation fees and generating more than \$48 million in total tax returns, \$13 million in Earned Income Tax Credits, and an estimated \$2.75 million in state and local sales taxes.

5. **State Agency Contacted?** Yes

a. If yes, which state agency? Department of Economic Opportunity

b. If no, which is the most appropriate state agency to place an appropriation for the issue being requested?

6. **Amount of Non-recurring Requested for fiscal year 2018-19:**

Amount Requested for Operations	Amount Requested for Fixed Capital Outlay	Total Amount of Requested State Funds
1,200,000		1,200,000

7. **Type, amount and percent of matching funds available for this project for fiscal year 2018-19:**

Type	Amount	Percent
Federal	0	0.0%
State (excluding the amount of this request)	0	0.0%
Local	1,800,000	60.0%
Other	0	0.0%
TOTAL	1,800,000	60.0 %

8. **Total Project Cost for fiscal year 2018-19 (including the Total Amount of Requested State Funds):** 3,000,000

9. **Previous Year Funding Details:**

a. Has funding been provided in a previous state budget for this activity? Yes

b. In the previous 5 fiscal years, how many years was funding provided? (Optional)

c. What is the most recent fiscal year the project was funded? 2016-17



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- d. Were the funds provided in the most recent fiscal year subsequently vetoed? Yes
 e. Complete the following Worksheet.

FY:	Input Prior FY Appropriation for this project for FY 2017-18		
	(If appropriated in FY 2017-18 enter the appropriated amount, even if vetoed.)		
Column:	A	B	C
Funds Description:	Prior Year Recurring Funds *	Prior Year Nonrecurring Funds *	Total Funds Appropriated (Column A + Column B)
Input Amounts:			

10. Is future-year funding likely to be requested?

Yes

- a. If yes, indicate non-recurring amount per year.

\$1,200,000

11. Program Performance:

- a. What is the specific purpose or goal that will be achieved by the funds requested?

To provide more than 30,000 low-to-moderate income working Floridians with income tax consulting and preparation assistance, saving them up to \$2.7 million in tax preparation fees and generating more than \$48 million in total tax returns, \$13 million in Earned Income Tax Credits, and an estimated \$2.75 million in state and local sales taxes.

- b. What are the activities and services that will be provided to meet the intended purpose of these funds?

\$1,000,000 to local United Ways to provide income tax consulting and preparation assistance to low-to-moderate income Florida workers. \$200,000 for statewide advertising and support.

- c. How will the funds be expended?

Spending Category	Description	Amount
Administrative Costs		
<input checked="" type="checkbox"/> Executive Director/Project Head Salary and Benefits	Implementation; Contract management; statewide oversight, administration and training	70,000



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<input type="checkbox"/> Other Salary and Benefits		
<input checked="" type="checkbox"/> Expense/Equipment/Travel/Supplies/Other	Executive director travel and miscellaneous expenses.	10,000
<input type="checkbox"/> Consultants/Contracted Services/Study		
Operational Costs		
<input type="checkbox"/> Salary and Benefits		
<input checked="" type="checkbox"/> Expense/Equipment/Travel/Supplies/Other	Marketing and Statewide & Regional Training	120,000
<input checked="" type="checkbox"/> Consultants/Contracted Services/Study	Contracts with local United Ways and partner agencies to hire coordinators to identify and secure sites and to provide services through certified IRS certified volunteers, etc.	1,000,000
Fixed Capital Construction/Major Renovation		
<input type="checkbox"/> Construction/Renovation/Land/Planning Engineering		
TOTAL		1,200,000

d. What are the direct services to be provided to citizens by the appropriations project?

Federal Income Tax Consulting & Preparation Assistance to low-to-moderate income workers.

e. Who is the target population served by this project? How many individuals are expected to be served?

More than 30,000 low-to-moderate income workers and their families.

f. What is the expected benefit or outcome of this project? What is the methodology by which this outcome will be measured?

More than 30,000 low-to-moderate income working Floridians assisted, saving them up to \$2.7 million in tax preparation fees and generating more than \$48 million in total tax returns, \$13 million in Earned Income Tax Credits, and an estimated \$2.75 million in state and local sales taxes. Outcomes determined through United Way, partners and IRS reports regarding tax filing returns.

g. What are the suggested penalties that the contracting agency may consider in addition to its standard penalties for failing to meet deliverables or performance measures provided for in the contract?



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Withholding of funds.

12. The owner(s) of the facility to receive, directly or indirectly, any fixed capital outlay funding. Include the relationship between the owner(s) of the facility and the entity.

N/A

13. Requestor Contact Information:

- a. **Name:** Ted Granger
- b. **Organization:** United Way of Florida
- c. **Email:** tgranger@uwof.org
- d. **Phone Number:** (850)488-8276

14. Recipient Contact Information:

- a. **Organization:** United Way of Florida
- b. **County:** Statewide, Alachua, Baker, Bay, Bradford, Brevard, Broward, Calhoun, Charlotte, Citrus, Clay, Collier, Columbia, DeSoto, Dixie, Duval, Escambia, Flagler, Franklin, Gadsden, Gilchrist, Glades, Gulf, Hamilton, Hardee, Hendry, Hernando, Highlands, Hillsborough, Holmes, Indian River, Jackson, Jefferson, Lafayette, Lake, Lee, Leon, Levy, Liberty, Madison, Manatee, Marion, Martin, Miami-Dade, Monroe, Nassau, Okaloosa, Okeechobee, Orange, Osceola, Palm Beach, Pasco, Pinellas, Polk, Putnam, Saint Johns, Saint Lucie, Santa Rosa, Sarasota, Seminole, Sumter, Suwannee, Taylor, Union, Volusia, Wakulla, Walton, Washington

c. Organization Type:

- For Profit
- Non Profit 501(c) (3)
- Non Profit 501(c) (4)
- Local Entity
- University or College
- Other (Please specify)

d. Contact Name: Ted Granger

e. E-mail Address: tgranger@uwof.org

f. Phone Number: (850)488-8276

15. If there is a registered lobbyist, fill out the lobbyist information below.

- a. **Name:** Ted Granger
- b. **Firm:** United Way of Florida
- c. **Email:** tgranger@uwof.org
- d. **Phone Number:** (850)488-8276