



The Florida Senate

Local Funding Initiative Request

Fiscal Year 2019-2020

LFIR#: 2343

1. Title of Project: Sant La - Community Financial Empowerment

2. Senate Sponsor: Jason Pizzo

3. Date of Submission: 02/07/2019

4. Project/Program Description:

This 3-prong program seeks to provide 1) free tax preparation to eligible low and moderate income individuals and families; 2) financial coaching to reach specific client goals; and 3) community education via radio and television about viable and credible asset-building products.

5. State Agency to receive requested funds : Department of Economic Opportunity

State Agency Contacted? No

6. Amount of the Nonrecurring Request for Fiscal Year 2019-2020

Type of Funding	Amount
Operations	100,000
Fixed Capital Outlay	
Total State Funds Requested	100,000

7. Total Project Cost for Fiscal Year 2019-2020 (including matching funds available for this project)

Type of Funding	Amount	Percent
Total State Funds Requested (from question #6)	100,000	80.00%
Federal	0	0.00%
State (excluding the amount of this request)	0	0.00%
Local	25,000	20.00%
Other	0	0.00%
Total Project Costs for Fiscal Year 2019-2020	25,000	100.0%

8. Has this project previously received state funding? No

Fiscal Year (yyyy-yy)	Amount		Specific Appropriation #	Vetoed
	Recurring	NonRecurring		

9. Is future-year funding likely to be requested? Yes

a. If yes, indicate non-recurring amount per year. \$100,000

10. Details on how the requested state funds will be expended

Spending Category	Description	Amount
Administrative Costs:		



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Executive Director/Project Head Salary and Benefits	10 percent of Executive Director's salary to provide guidance and leadership for project sustainability.	9,400
Other Salary and Benefits	Benefits calculated at 21 percent of salary and include FICA, MICA, unemployment, workman's compensation, health, vision, and dental insurance.	1,974
Expense/Equipment/Travel/Supplies/Other		
Consultants/Contracted Services/Study		
Operational Costs:		
Salary and Benefits	100 percent of salary for 2 staff members: Tax Preparer and part-time Financial Coach	82,026
Expense/Equipment/Travel/Supplies/Other	Program supplies, photo copier at 10 percent of agency's annual cost.	1,200
Consultants/Contracted Services/Study	Accounting and Auditing services at 10 percent of agency's annual costs	5,400
Fixed Capital Construction/Major Renovation:		
Construction/Renovation/Land/Planning Engineering		
Total State Funds Requested (must equal total from question #6)		100,000

11. Program Performance:

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

The purpose of this program is to address the issue of vulnerability to financial predators and wealth disparity in immigrant communities by increasing the financial literacy, awareness of financial products, and free tax preparation for eligible low and moderate income Haitian families in Miami-Dade County.

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

The program will provide three main services : (1) tax preparation as well as tax return amendments , (2) One-on-one financial coaching with a focus on issues such as credit building and saving for homeownership, college, and retirement. (3) Education on financial topics via Haitian Creole media about viable financial products and services and to protect them from tax refund scams, predatory lenders, and investment scams.

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

The program will offer free tax preparation services to a minimum of 600 clients; financial coaching will be offered to all clients and anticipate that 300 individuals will be engaged in long-term financial coaching. Finally, community residents will gain increased awareness of asset building products such as IRAs, savings bonds, and children's savings accounts; as well as asset protection tools such as wills and medical proxies, among others.

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

This program seeks to financially empower immigrant families in Miami-Dade County, specifically targeting Haitian immigrants, who are at greater risk of being left out of the financial mainstream and are also highly



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vulnerable to predatory financial products and services. Sant La seeks to target Miami-Dade County's racial and ethnic groups, particularly the Haitian community. Sant La expects to serve 300 households directly, and to reach 100,000+ Haitian households via media, including a weekly Creole-language television program, Teleskopi. Miami-Dade's Haitian population is conservatively estimated at 128,000, largely immigrants.

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

Sant La seeks a long term impact on the Haitian community by guiding individuals and families to solid and valuable financial services and to help them avoid dangerous and predatory practices. Since Sant La became an IRS-certified VITA site in 2013, they have prepared more than 10,000 returns. The efforts have increased the number of Haitian families filing taxes to claim the earned income and child tax credits, if they are eligible. These returns represent over \$10 million reinvested in the local economy, increasing assets and investing in businesses which are Haitian-owned and/or serve the Haitian community.

f. 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?

Standard contract penalties.

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:** Gepsie Metellus
- b. **Organization:** Haitian Neighborhood Center, Sant La
- c. **E-mail Address:** gepsiem@santla.org
- d. **Phone Number:** (305)573-4871 Ext. 128

14. Recipient Contact Information:

- a. **Organization:** Haitian Neighborhood Center, Sant La
- b. **County:** Miami-Dade
- 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:** Gepsie Metellus
- e. **E-mail Address:** gepsiem@santla.org
- f. **Phone Number:** (305)573-4871 Ext. 128



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15. Lobbyist Contact Information

- a. **Name:** None
- b. **Firm Name:** None
- c. **E-mail Address:**
- d. **Phone Number:**