



# The Florida Senate

## Local Funding Initiative Request

### Fiscal Year 2023-2024

LFIR # 2861

1. **Project Title**

2. **Senate Sponsor**

3. **Date of Request**

4. **Project/Program Description**

The requested funds will be used to provide enhanced Volunteer Income Tax Assistance (VITA) and financial coaching services to working families and individuals throughout the state, reaching under-served populations in the hardest-to-reach areas.

5. **State Agency to receive requested funds**

**State Agency contacted?**

6. **Amount of the Nonrecurring Request for Fiscal Year 2023-2024**

Type of Funding	Amount
Operations	1,200,000
Fixed Capital Outlay	0
<b>Total State Funds Requested</b>	<b>1,200,000</b>

7. **Total Project Cost for Fiscal Year 2023-2024 (including matching funds available for this project)**

Type of Funding	Amount	Percentage
Total State Funds Requested (from question #6)	1,200,000	40%
<b>Matching Funds</b>		
Federal	0	0%
State (excluding the amount of this request)	0	0%
Local	1,800,000	60%
Other	0	0%
<b>Total Project Costs for Fiscal Year 2023-2024</b>	<b>3,000,000</b>	<b>100%</b>

8. **Has this project previously received state funding?**

Fiscal Year (yyyy-yy)	Amount		Specific Appropriation #	Vetoed
	Recurring	Nonrecurring		
2020-21	0	1,200,000	2288A	Yes

9. **Is future funding likely to be requested?**

a. **If yes, indicate nonrecurring amount per year.**

b. **Describe the source of funding that can be used in lieu of state funding.**

10. **Has the entity requesting this project received any federal assistance related to the COVID-19 pandemic?**

**If yes, indicate the amount of funds received and what the funds were used for.**



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A Paycheck Protection Program loan in the amount of \$47,685 was approved. The funding was used to support payroll costs and address the impact of the COVID-19 pandemic.

## Complete questions 11 and 12 for Fixed Capital Outlay Projects

### 11. Status of Construction

a. What is the current phase of the project?

- Planning   
  Design   
  Construction

b. Is the project "shovel ready" (i.e permitted)?

c. What is the estimated start date of construction?

d. What is the estimated completion date of construction?

12. List the owners of the facility to receive, directly or indirectly, any fixed capital outlay funding. Include the relationship between the owners of the facility and the entity.

### 13. Details on how the requested state funds will be expended

Spending Category	Description	Amount
<b>Administrative Costs:</b>		
Executive Director/Project Head Salary and Benefits	Implementation; contract management; statewide oversight, administration, and training.	70,000
Other Salary and Benefits		0
Expense/Equipment/Travel/Supplies/Other	Executive director travel and miscellaneous expenses.	10,000
Consultants/Contracted Services/Study		0
<b>Operational Costs: Other</b>		
Salary and Benefits		0
Expense/Equipment/Travel/Supplies/Other	Marketing and statewide and regional training	120,000
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.	1,000,000
<b>Fixed Capital Construction/Major Renovation:</b>		
Construction/Renovation/Land/Planning Engineering		0
<b>Total State Funds Requested (must equal total from question #6)</b>		<b>1,200,000</b>

### 14. Program Performance

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

Providing enhanced Volunteer Income Tax Assistance (VITA) and financial coaching services to working families and individuals throughout the state reaching under-served populations in the hardest-to-reach areas

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



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United Ways and their partners will secure donated office space from community partners: non-profit, for-profit, and governmental at which IRS-certified volunteers will help low- and moderate-income workers complete their federal income tax returns. Site coordinators will be hired to identify, secure, and set up the sites and recruit and help certify volunteer tax preparers, improving accuracy.

**c. What direct services will be provided to citizens by the appropriation project?**

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 will be quantified primarily through official IRS reports and supplemented with data provided by UW.

**d. 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

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

\$48 million in federal income tax returns for low-to-moderate income working Floridians, which can be measured via IRS reports and documentation by local United Ways

**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 the contract?**

Reduced funding based on percentage of deliverables unmet

**15. Requester Contact Information**

**a. First Name**  **Last Name**

**b. Organization**

**c. E-mail Address**

**d. Phone Number**  **Ext.**

**16. Recipient Contact Information**

**a. Organization**

**b. Municipality and County**

**c. Organization Type**

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

**d. First Name**  **Last Name**

**e. E-mail Address**



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f. Phone Number

#### 17. Lobbyist Contact Information

a. Name

b. Firm Name

c. E-mail Address

d. Phone Number