



The Florida Senate

Local Funding Initiative Request

Fiscal Year 2019-2020

LFIR#: 1859

1. **Title of Project:** Income Tax Consulting and Preparation

2. **Senate Sponsor:** Audrey Gibson

3. **Date of Submission:** 02/14/2019

4. **Project/Program Description:**

IRS-certified income tax specialists will assist more than 30,000 low-to-moderate income workers and their families to complete and file their 2018 federal income tax returns, saving them up to \$2.7 million in tax preparation fees, helping them recoup more than \$48 million in total tax returns and \$13 million in Earned Income Tax Credits (EITCs), and generating an estimated \$2.75 million in state and local sales taxes. Low income Floridians currently leave more than \$1 billion "on-the-table" in EITC funds each year and research shows EITCs are the best tax policy tool to help raise workers out of poverty. All 67 counties will be served.

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

State Agency Contacted? Yes

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

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

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)	1,200,000	40.00%
Federal	0	0.00%
State (excluding the amount of this request)	0	0.00%
Local	0	0.00%
Other	1,800,000	60.00%
Total Project Costs for Fiscal Year 2019-2020	3,000,000	100.0%

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

Fiscal Year (yyyy-yy)	Amount		Specific Appropriation #	Vetoed
	Recurring	NonRecurring		
2016-17		500,000	2177A	No

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

a. **If yes, indicate non-recurring amount per year.** \$1,200,000



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

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

11. Program Performance:

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

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 (EITCs), and an estimated \$2.75 million in state and local sales taxes. The EITC is recognized as being the best tax policy tool available to assist low income workers climb out of poverty. Workers will be served in all 67 counties.

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

The United Way and their partners will secure donated office space in facilities owned by non-profit, for-profit, and governmental partners at which IRS-certified volunteers will assist low and moderate income workers complete their federal income tax returns. Site coordinators will be hired to identify, secure, and set up the sites; recruit and get volunteer tax preparers certified; reach out to potential clients through employers and community partners; raise community awareness about the services available in their areas; coordinate scheduling of appointments, and preparer schedules, etc.

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

More than 30,000 low-to-moderate income Florida workers will be receive assistance in preparing and filing their 2019 federal income tax returns

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

The target population is low-to-moderate income Florida workers and at least 30,000 of them will be served.



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e. 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 will be quantified primarily through official IRS reports and supplemented with data provided by the United Way and their partners.

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.

NA

13. Requestor Contact Information:

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

14. Recipient Contact Information:

- a. **Organization:** United Way of Florida
- b. **County:** Leon
- 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. Lobbyist Contact Information

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