



Travis County Commissioners Court Agenda Request

Meeting Date: October 23, 2012

Prepared By/Phone Number: David A. Salazar 854-4107

Elected/Appointed Official/Dept. Head: Sherri E. Fleming,
County Executive for Health and Human Services and Veterans Service

Commissioners Court Sponsor: Judge Samuel T. Biscoe

AGENDA LANGUAGE:

Consider and Take Appropriate Action on Request for Assistance from Foundation Communities for the Operation of its Tax Preparation Assistance Program during the 2013 Tax Season to Provide Free Income Tax Filing Assistance to Eligible Residents:

- A. Agreement for the Provision of Space at Travis County's South Rural Community Center in Del Valle for the Operation of Tax Preparation Assistance Program during the 2013 Tax Season;
- B. In-Kind Support to Foundation Communities' Tax Preparation Assistance Program in the Form of Printing Brochures, Fliers, Forms and Other Promotional Materials for the 2013 Tax Season; and
- C. In-Kind Support to Foundation Communities' Tax Preparation Assistance Program in the Form of Deaf Interpreters Services for the 2013 Tax Season.

BACKGROUND/SUMMARY OF REQUEST AND ATTACHMENTS:

Please see attached memo.

STAFF RECOMMENDATIONS:

Staff recommends approval of this request consistent with the Court's past commitment to support of Community Tax Centers.

ISSUES AND OPPORTUNITIES:

Please see attached memo.

AGENDA REQUEST DEADLINE: All agenda requests and supporting materials must be submitted as a pdf to the County Judge's office, agenda@co.travis.tx.us by **Tuesdays at 5:00 p.m.** for the next week's meeting.

Updated 10-18-12 at 4:00pm

FISCAL IMPACT AND SOURCE OF FUNDING:

Approving this request will not increase the County Budget.

REQUIRED AUTHORIZATIONS:

Mary Etta Gerhardt

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**TRAVIS COUNTY HEALTH and HUMAN SERVICES
and VETERANS SERVICE
502 E. Highland Mall Blvd
P. O. Box 1748
Austin, Texas 78767**

**Sherri E. Fleming
County Executive
(512) 854-4100
Fax (512) 854-4115**

DATE: October 16, 2012

TO: Members of the Commissioners Court

FROM: _____
Sherri E. Fleming, County Executive for
Health and Human Services and Veterans Service

SUBJECT: Request for Support from Tax Preparation Assistance Program

Proposed Motion:

Consider and Take Appropriate Action on Request for Assistance from Foundation Communities for the Operation of its Tax Preparation Assistance Program during the 2013 Tax Season to Provide Free Income Tax Filing Assistance to Eligible Residents:

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- C. In-Kind Support to Foundation Communities' Tax Preparation Assistance Program in the Form of Deaf Interpreters Services for the 2013 Tax Season.

Summary and Staff Recommendations:

Staff recommends that the Court grant the request from Foundation Communities for the following in-kind assistance:

- Printing services for 393,120 images for flyers, envelopes and applications (last year's proposal called for 247,960 images);
- American Sign Language Interpreter services at the Community Financial Center at 2600 W. Stassney Lane;
- Operation of Community Tax Centers at Travis County's South Rural Community Center in Del Valle.

Staff recommends approval of a License Agreement for the establishment and operation of the coming year's Community Tax Center at Travis County's South Rural Community Center in Del Valle. If approved, the South Rural Community Center's Tax Assistance program will operate from January 21, 2013 through April 15, 2013. The printing job, if approved by the Court, can be completed by the Travis County Print Shop and Interpreter services can be provided through Travis County Services for the Deaf and Hard of Hearing.

Budgetary and Fiscal Impact:

Travis County's Print Shop Supervisor Robert Duke is reviewing the documents received from Foundation Communities and staff believes the estimate to provide the requested documents would not exceed \$6,000.00 (based on the previous year's actual cost of \$10,193.88) in printing, materials and staff time.

Travis County HHS&VS Services for the Deaf and Hard of Hearing estimates the cost of providing American Sign Language Interpreter Services at the Community Tax Center to be \$13,000 (based on previous year's expenditures), if used at the peak expected volume and providing services on weekends. As in past years, these services would be scheduled in advance through 211 with the staff from Services for the Deaf and Hard of Hearing.

Issues and Opportunities:

Travis County Commissioners Court and Travis County Health and Human Services and Veterans Service are committed to facilitating economic opportunities for all of the County's residents. The Court has been supportive of the Community Tax Center effort for the past five years with in-kind assistance and announcements to Travis County employees as well as access to American Sign Language Interpreter Services through the Community Tax Center program of Foundation Communities.

Foundation Communities has confirmed the following for Community Tax Centers locations around Central Texas:

The Community Financial Center, 2600 West Stassney Lane, Austin, TX 78745;
Goodwill Community Center, 1015 Norwood Park Blvd., Austin, TX 78753;
Workforce Solutions Capital Area, 6505 Airport Blvd., Austin, TX 78752;
IDEA Allan, 4900 Gonzales St., Austin, TX 78702;
Round Rock Public Library, 216 E. Main St., Round Rock, TX 78664; and
Lifeworks, 835 N. Pleasant Valley, Austin, TX 78702.

In addition, the organization anticipates confirming additional sites in the near future; and would, with the Court's approval, like to include the following Travis County location:

South Rural Community Center, 3528 FM 973, Del Valle, TX 78617.

In 2012, Foundation Communities operated a Community Tax Center at Travis County's South Rural Community Center at Del Valle. During the 2012 Tax Season, the CTC's assisted over 16,227 clients, including over 300 Deaf and Hard of Hearing taxpayers, with their 2011 tax returns. These clients were able to claim over \$11,230,952.00 in Earned Income Tax Credits without tax preparation fees and a total of \$27,608,738.00 in tax refunds.

Based on IRS figures, Foundation Communities reports that the clients they served averaged \$20,913 in Adjusted Gross Incomes, well below the average income for the general taxpayer population. The goal is to increase these numbers by focusing on the areas of highest need.

Background

Since 2003, the Court has worked with community-based organizations, like Foundation Communities, which has partnered with the Internal Revenue Service, to support the Volunteer Income Tax Assistance (VITA) program reaching out to targeted populations, in English and Spanish, to affect the completing and filing of income tax forms and provide financial skills trainings. Area Tax Assistance Programs have been successful in engaging these targeted populations through the network of social service providers, door-to-door contact, distribution of forms and fliers, and available assistance at Community Tax Centers.

Central to Community Tax Centers' mission is to provide free tax services to households that qualify for the Earned Income Tax Credit (EIC), the largest federal government funded anti-poverty program. The EIC is available to families with annual earned incomes not exceeding \$50,000. In order to claim the EIC, a taxpayer must submit a federal income tax return along with supporting worksheets verifying their eligibility for the credit. During the last five years, eligible taxpayers have claimed over \$29 million in EIC through the Community Tax Centers.



Program Partnership with Travis County Services for the Deaf & Hard of Hearing Tax Season 2013 ASL Interpreters

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About the Community Tax Centers

The Community Tax Centers Program provides free-income tax assistance, education and outreach to residents of Austin and the surrounding areas. Each year, volunteer income tax preparers receive IRS-based tax law training and must pass IRS certification exams in order to assist clients through this program. Volunteers help clients file federal income tax returns for the current and prior years and help clients prepare applications for Individuals Taxpayer Identification Numbers (ITIN) when required. During the 2012 filing season, 16,227 tax returns were prepared bringing in over \$27 million to the local economy in the form of refunds. Of the total refunds, over \$11 million was in the form of the Earned Income Tax Credit, our nation's largest anti-poverty program. The average income for our tax center clients in 2012 was \$20,913.31. Over 300 Deaf/HOH clients received tax preparation through appointments with ASL interpreters. Foundation Communities (a local non-profit) administers the CTC program in partnership with the Internal Revenue Service and receives federal, local and private funds to support the program.

The Community Tax Centers serve clients off all backgrounds and abilities. The Deaf/HOH population that we have been serving has been growing year-to-year due to increased outreach efforts to this population and increased awareness of our service. Eligible clients (including our Deaf/HOH clients) must have annual household incomes that do not exceed **\$50,000** and tax scenarios that volunteer income tax preparers are trained and certified to assist with.

Deaf/HOH clients who would like to schedule an appointment with an ASL interpreter will have the option of going online to schedule an appointment at www.communitytaxcenters.org, calling our appointment line number, or sending an email to asltaxhelp@foundcom.org.

Proposal for 2013

Foundation Communities requests that Travis County Services for the Deaf/HOH provide 2 ASL interpreters at the Community Financial Center location (2600 W. Stassney Lane) from **January 21rd to April 15, 2012**. The proposed schedule is outlined below and will be adjusted according to what's approved by the County. **This schedule would allow us to provide tax preparation to 370 Deaf/HOH clients.**

Days	Proposed ASL Interpreter Schedule
Monday and Thursday	2:00 p.m. to 7:00 p.m.
Saturdays	10:00 am to 3:00 pm

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Travis County Itemized Print Schedule for Community Tax Centers

Item #	Category	Specifications (dimensions)	Paper color	Qty	Target Rcvd Deadlines
<i>Volunteer Training Materials</i>					
1	New Volunteer Training Packet	30 pp booklet, 8 1/2" x 11", double-sided	Pastel Yellow	300	11/18/2011
2	Returning Volunteer Training packets	11 page booklet, 8 1/2" x 11", double-sided	Pastel Blue	100	11/18/2011
3	Additional Returning Volunteer Training Packet	11 page booklet, 8 1/2" x 11", double-sided	Pastel Green	100	11/18/2011
4	Volunteer Quick Resource Guide	7 page booklet, 8/12 " X 14", double-sided	white	1,000	11/18/2011
5	ITIN Training Materials	7 pp, 8 1/2" x 11" double-sided	white	300	11/18/2011
6	ITIN Resource Guide	8 pp, 8 1/2" x 11", double-sided	white	30	11/18/2011
7	Volunteer Scheduling Software Instruction Guide	1 page, 8 1/2" x 11"	Florescent Orange	1,000	11/18/2011
8	Volunteer Certification Instruction guide	1 page, 8 1/2" x 11"	Florescent Yellow	1,000	11/18/2011
9	1040 levels page	1 page, 8 1/2" x 11", double-sided	white	1,000	11/18/2011
10	CTC Process Handout	1 page, 8 1/2" x 11"	white - color	1,000	11/18/2011
11	Intake Specialist Handbook	9 pp, 8 1/2" x 11", double-sided	white	200	11/18/2011
12	Volunteer Philosity and Bill of rights	1 page, 8 1/2" x 11"	white	1,000	11/18/2011
13	Volunteer Job Descriptions	1 page, 8 1/2" x 11"	white	1,000	11/18/2011
<i>Community Outreach Materials</i>					
14	All locations and public operations schedule	1 page, 8 1/2" x 11", double sided	pastel yellow	25,000	12/16/2011
15	ITIN Brochure	(double-sided, tri-fold) (Spanish)	white	2,000	1/4/2012
16	All Services Brochure	(double-sided, tri-fold)	Blue	20,000	1/4/2012
<i>Administrative Materials</i>					
17	Processing and tracking envelope	(Manila (12 X 9 inches) , front side, Open Top Flap	Manila	22,000	1/4/2012
18	Taxpayer Take-home envelope	(White- 12 X 9 inches), double sided, Open Top Flap	White	20,000	1/4/2012
19	Customer Satisfaction Survey	(8 1/2 "x 11" page double-sided, cut in 1/2)	White	15,000	1/4/2012
20	Client Consent Form (English)	(1page, English, 8 1/2" x 11", double-sided, full page)	White	16,500	1/4/2012
21	Client Consent Form (Spanish)	(1 page, Spanish, 8 1/2" x 11"double-sided, full page)	White	8,500	1/4/2012
Total Quantity:				137,030	



2012 Filing Season Summary

Locations	# Tax Returns	Total Refunds	Total Earned Income Tax Credit
Community Financial Center	5,380	\$9,486,531	\$3,972,379
Goodwill Community Center	3,648	\$6,933,172	\$2,736,048
Workforce Solutions Capital Area	2,347	\$3,940,568	\$1,642,970
Montopolis Recreation Center	640	\$911,038	\$358,457
Allan Elementary	616	\$1,077,076	\$458,228
St. John's Recreation Center	217	\$437,074	\$183,368
Round Rock Public Library	1,470	\$2,989,805	\$1,085,201
South Rural Community Center, Del Valle	238	\$550,702	\$188,693
Workforce Solutions (Bastrop)	216	\$282,777	\$103,714
Drop-Off Service	322	\$560,921	\$213,263
Out-of-Scope/Casualty Loss	151	\$98,366	\$56,199
Prior Year Tax Services*	1,054	\$340,708	\$232,432
TOTALS	16,227	\$27,608,738	\$11,230,952

* Comprises returns prepared for TY 2000-2011.

Additional highlights:

- More than **600 volunteers** gave over **30,000 hours of service**
- 685 clients allocated a portion of their tax refunds to purchasing more than **\$82,000** worth of savings bonds
- Processed **147 ITIN** (Individual Taxpayer Identification Number) Applications
- Prepared more than **900 FAFSAs** (Free Application for Federal Student Aid)

Our Year-Round Tax Center will re-open on May 29.

Location: The Community Financial Center
2600 West Stassney Lane (near Westgate)
Austin, Texas, 78745

For more information, call 2-1-1, or log onto www.communitytaxcenters.org

Thanks for your support!

2013 PRINTING QUOTE FOR THE COMMUNITY TAX CENTER

1. New volunteer training packet	\$113.76
2. Returning Volunteer Training packets	\$33.60
3. Parameter Comparison	\$7.79
4. ITIN Training Materials	\$100.98
5. ITIN Resource Guide	\$17.32
6. Volunteer Scheduling Software Instruction Guide	\$29.92
7. Volunteer Certification Instruction Guide	\$44.98
8. 1040 Levels page	\$35.67
9. Intake Specialist Handbook	\$20.67
10. Volunteer Philosophy, Bill of Rights, Job Description	\$35.67
11. Volunteer scripts	\$8.22
12. It's my first day checklist	\$18.63
13. Volunteer Sign-in Sheets	\$10.31
14. Schedule C Initiative Training Materials	\$35.62
15. CTC General Flyer	\$334.00
16. CTC Schedule	\$292.90
17. ITIN Brochure	\$83.38
18. ITIN Flyer	\$67.20
19. ASL Flyer	\$68.80
20. FAFSA Flyer	\$57.00
21. Austin Creatives' Day	\$66.00
22. Client Sign-In Sheets	\$49.72
23. Processing and Tracking Envelope	\$1,365.53
24. Taxpayer Take-Home Envelope	\$1,821.53
25. Customer Satisfaction Sheet	\$118.23
26. Client Drop-off Sheets	\$15.84
27. Make an appointment cards	\$38.00
28. FAFSA Intake forms	\$35.67
TOTAL	\$5,926.94