



Travis County Commissioners Court Agenda Request

Meeting Date: October 14, 2014

Prepared By/Phone Number: Juanita Jackson/854-4467

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 the Following Requests from Foundation Communities related to the Operation of its Tax Preparation Assistance Program for Eligible Residents during the 2015 Tax Season:

- A. In-Kind Support in the Form of Printing Brochures, Fliers, Forms and Other Promotional Materials for the 2015 Tax Season; and
- B. In-Kind Support in the Form of American Sign Language Services (Services for the Deaf and Hard of Hearing) for the 2015 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 the Community Tax Centers.

ISSUES AND OPPORTUNITIES:

FISCAL IMPACT AND SOURCE OF FUNDING:

	FY 2014	FY 2013	FY 2012	FY 2011
Printing	\$4,109.00	\$6,000.00	\$6,000.00	\$5,502.00
Interpreters	\$22,682.77	\$18,930.00	\$13,987.25	

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.

While staff estimated the not-to-exceed amount at \$15,000 in previous year's for interpreters, the cost has increased to \$22,682.77 as of last fiscal year.

REQUIRED AUTHORIZATIONS:

Mary Etta Gerhardt

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.



www.communitytaxcenters.org
www.foundcom.org

Request to Travis County For In-Kind Print Services and ASL Interpreters for Tax Season 2015

Program Contact

Karen Serna, Director of Asset Building Programs
2600 West Stassney Lane, Austin, TX 78745
Karen.Serna@foundcom.org
512-610-4022

The Community Tax Centers

The Community Tax Centers Program, a program of local non-profit Foundation Communities, provides free-income tax assistance and education to residents of Travis County 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. The 2014 filing season was a record-breaking one. Between January and April we prepared 19,689 returns representing a 7% growth over the prior year. The tax centers returned over \$35 million to the local economy. Of the total refunds, over \$19.2 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 2014 was \$21,500. Helping families save money on exorbitant commercial tax preparation fees is particularly important in these trying economic times. The demand for our services has never been greater.

To be eligible for our services, households must have incomes at our below \$50,000 and have tax scenarios that our volunteer tax preparers are trained and certified to assist with. Foundation Communities administers the tax center program in partnership with the Internal Revenue Service (we are a Volunteer Income Tax Assistance or VITA site), and receives federal, local and private funds to support the program.

More than Just Tax Prep

The Community Tax Centers provide more than just free tax preparation to clients. Clients can also meet one-on-one with a volunteer financial coach who can guide them to making the best use of their refund. Clients wanting to pursue post-secondary education can meet with one of our FAFSA (Free Application for Federal Student Aid) preparers who will help them complete the FAFSA (most of the information on the FAFSA comes from the client's tax form) and provide guidance on navigating the confusing world of financial aid.

Serving the Deaf/HOH Population

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. Deaf/HOH clients who would like to schedule an appointment with an ASL interpreter have the option of going online to schedule an appointment at www.communitytaxcenters.org, calling our appointment line number, or sending an email to appts@foundcom.org. Close to 400 Deaf/HOH clients received tax preparation through appointments with ASL interpreters, thanks to in-kind support from Travis County.

Printing

Because of budget cuts, the IRS provides less and less each year when it comes to print materials and requires us to shoulder more of the cost of printing materials. When training 600 volunteers and preparing taxes for 20,000 clients, these print costs quickly add up. As much as we can we provide electronic forms of documents; however, even with the widespread use of smart phones with internet connectivity by low-income clients, not all clients have smart phones, and tax documents can be very difficult to read and understand when accessing them through a mobile device. We continue to print the most important and frequently used documents to ensure all clients and volunteers have equal access to the same information. Last tax season, we printed nearly 170,000 pieces – from training materials for volunteers to promotional, educational and informational materials for our clients.

The 2015 Filing Season

In the 2015 tax season, we expect to serve over 20,000 clients at six locations (five in Travis County and one in Williamson County) which collectively will be open 240 hours per week from the end of January through the filing deadline of April 15, 2015. The anticipated sites are:

The Community Financial Center (will serve 7,300)
2600 West Stassney Lane, Austin, TX 78745

Lifeworks East Office (will serve 2,265)
835 N. Pleasant Valley Rd, Austin, TX 78702

Highland Mall (will serve 5,800)
6001 Airport Blvd, Austin, TX 78752

IDEA Allan (will serve 1,000) NEW SITE
1701 Vargas Road, Austin, TX 78741

Camp Mabry (will serve 125)
2200 W 35th St, Austin, TX 78703

Additionally, we will continue to offer drop-off return preparation, self-preparation software, and a site at the Round Rock Public Library.

Request for 2015

With the County’s continued support we will be able to increase the number of eligible households served, ensure that more refunds and credits are delivered to working individuals and families in Central Texas, and help those receiving refunds make the best use of them as possible.

ASL Interpreters

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 19th to April 15th, 2014** to assist with tax preparation, financial coaching, and FAFSA preparation appointments. 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 services to 450 Deaf/HOH clients.**

Days	Proposed ASL Interpreter Schedule
Mondays, Tuesdays, Wednesdays, & Thursdays	2:00 p.m. to 7:00 p.m.

We also request that the County provide pro-bono print services to support our community outreach and program administration needs. Below is an itemized list of the requested print items, general specifications, and target deadlines for your consideration. **In total, the County would support the printing and delivery of 87,000 print materials to the Community Tax Centers.**

2015 Travis County Itemized Print Schedule for Community Tax Centers								
Item #		Dimensions	Pages of Text	Double-Sided?	Paper color	Qty	Target Rcvd Deadlines	
1	CTC Locations & Schedule Flyer	8 1/2" x11" 12 X 9 inches; open top flap; print front side only	2	YES	PASTEL YELLOW	35,000	11/15/2014	4
2	Processing and Tracking Envelope	12 X 9 inches; open top flap, print English front side & Spanish back side	1	NO	MANILA	26,000	1/3/2014	
3	Taxpayer Take-home envelope	12 X 9 inches; open top flap, print English front side & Spanish back side	2	YES	WHITE	26,000	1/3/2014	
Total Quantity:						87,000		

Juanita Jackson

From: Taylor Masters
Sent: Monday, September 08, 2014 2:57 PM
To: Juanita Jackson
Cc: Cathy Dawkins
Subject: RE: Request for Travis County Support: 2015 tax season
Attachments: Travis County Request 2015.docx

Ms. Juanita Jackson

Here is the cost for the Foundation Communities request for in-kind print services for 2015.

35,000 CTC Locations & Schedule Flyer 8 1/2" x11" 2 pages duplex on pastel yellow: \$889.00
26,000 Processing and Tracking Envelope 12 X 9 inches; open top flap; print front side only MANILA : \$1550.00
26,000 Taxpayer Take-home envelope 12 X 9 inches; open top flap, print English front side & Spanish back side: \$1670.00

Total cost for all three jobs for in-kind services for Foundation Communities: \$4,109.00

Feel free to call me If you have any questions or concerns. The jobs quotes are for the jobs mentioned in the attachment. Let me know when this is going to court. I'll ask Cathy Dawkins where the BA goes. I'll have your NFBPA Leadership Summit quote to you asap.

Thank You

Taylor Masters

Travis County Print Shop - Supervisor

Taylor.Masters@co.travis.tx.us

PrintShop@co.travis.tx.us

512-854-9104

From: Juanita Jackson
Sent: Wednesday, August 20, 2014 4:42 PM
To: Taylor Masters
Subject: FW: Request for Travis County Support: 2015 tax season

Taylor,

I hope this message find you well. Please see the attached document. I need a quote for the items as listed. Give me a call if you have any questions.

Thanks,

Juanita Jackson

Executive Assistant
County Executive for
Travis County Health & Human Services and Veterans Services
502 E. Highland Mall Blvd. Austin, TX 78752
PH: 512-854-4467 Cell: 512-541-6633 Fax: 512-279-2197
juanita.jackson@co.travis.tx.us

From: Karen Serna [<mailto:karen.serna@foundcom.org>]
Sent: Tuesday, August 05, 2014 1:55 PM
To: Juanita Jackson
Subject: Request for Travis County Support: 2015 tax season

Hi Juanita,

Hope this email finds you doing well. I'd like to submit our request for in-kind support through Travis County for our next tax season. I've attached a proposal for your review – would you let me know if there have been any changes to the process for requesting support? Happy to provide you with whatever you need.

I look forward to hearing from you.

Take care, Karen

Karen Lyons Serna

Director of Asset Building Programs | Foundation Communities | www.foundcom.org
512-610-4022 | karen.serna@foundcom.org

Our newest property, Captial Studios, is opening soon!