



# The Florida Senate

## Local Funding Initiative Request

### Fiscal Year 2024-2025

LFIR # 1586

1. Project Title

2. Senate Sponsor

3. Date of Request

4. Project/Program Description

This project will provide enhanced Volunteer Income Tax Assistance (VITA) to working families in the state's ALICE population (Asset-Limited, Income-Constrained, Employed). VITA helps underserved communities in hard-to-reach areas meet tax obligations and receive the highest refund for which they are eligible. Additional funding will further extend the reach of these services and make them easier for families to use by increasing the number of locations and hours of operation. These services will help working Florida families recover hard-earned wages that are often left on the table in Washington, as well as Earned Income Tax Credits and education tax credits to help cover the cost of higher education, and help set them on the path toward long-term financial stability.

5. State Agency to receive requested funds

State Agency contacted?

6. Amount of the Nonrecurring Request for Fiscal Year 2024-2025

Type of Funding	Amount
Operations	1,800,000
Fixed Capital Outlay	0
<b>Total State Funds Requested</b>	<b>1,800,000</b>

7. Total Project Cost for Fiscal Year 2024-2025 (including matching funds available for this project)

Type of Funding	Amount	Percentage
Total State Funds Requested (from question #6)	1,800,000	50%
<b>Matching Funds</b>		
Federal	0	0%
State (excluding the amount of this request)	0	0%
Local	1,800,000	50%
Other	0	0%
<b>Total Project Costs for Fiscal Year 2024-2025</b>	<b>3,600,000</b>	<b>100%</b>

8. Has this project previously received state funding?

Fiscal Year (yyyy-yy)	Amount		Specific Appropriation #	Vetoed
	Recurring	Nonrecurring		
2023-24	0	1,200,000	2336A	No

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?



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Yes

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

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   
  N/A

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	80,000
Other Salary and Benefits		0
Expense/Equipment/Travel/Supplies/Other	Executive director travel and miscellaneous expenses	20,000
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	150,000
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	1,550,000
<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>1,800,000</b>

### 14. Program Performance

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



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Providing enhanced Volunteer Income Tax Assistance (VITA) to working families in the state's ALICE population (Asset-Limited, Income-Constrained, Employed). VITA helps underserved communities in hard-to-reach areas meet tax obligations and receive the highest refund for which they are eligible. Additional funding will further extend the reach of these services and make them easier for families to use by increasing the number of locations and hours of operation.

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

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?**

These services will help working Florida families recover hard-earned wages that are often left on the table in Washington, as well as Earned Income Tax Credits and education tax credits to help cover the cost of higher education. VITA programs also help families save on tax preparation fees and they generate additional state and local taxes, stimulating economic activity.

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

The target population includes low-to-moderate income workers who are members of Florida's ALICE population. It is expected that tens of thousands of individuals will be served.

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

The expected benefits of this project include enhancing individuals' economic self sufficiency by allowing them to keep and utilize more of their hard-earned money for expenses like preventative healthcare, groceries, increased housing costs or needed car repairs. Additional education tax credits obtained through Volunteer Income Tax Assistance will also help individuals in Florida's ALICE population afford the cost of higher education. These resources will set families on the path for long-term financial stability. Finally, significant local sales tax revenue generated from expenditures associated with VITA participants' recovered wages and tax credits will improve economic activity. Outcomes will be measured by IRS reports, documentation by local United Ways, and local and state economic reporting.

**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?**

Reduce 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)



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

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

**e. E-mail Address**

**f. Phone Number**

#### 17. Lobbyist Contact Information

**a. Name**

**b. Firm Name**

**c. E-mail Address**

**d. Phone Number**