



# The Florida Senate

## Local Funding Initiative Request

### Fiscal Year 2020-2021

LFIR # 2043

1. **Project Title**
2. **Senate Sponsor**
3. **Date of Request**

4. **Project/Program Description**

An IRS-certified income specialist will assist more than 30,000 low-to-moderate income workers and their families to complete and file their 2020 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**
- State Agency contacted?     Yes     No

6. **Amount of the Nonrecurring Request for Fiscal Year 2020-2021**

Type of Funding	Amount
Operations	<input style="width: 100px;" type="text" value="1,200,000"/>
Fixed Capital Outlay	<input style="width: 100px;" type="text" value="000"/>
<b>Total State Funds Requested</b>	<b>1,200,000</b>

7. **Total Project Cost for Fiscal Year 2020-2021 (including matching funds available for this project)**

Type of Funding	Amount	Percentage
Total State Funds Requested (from question #6)	<input style="width: 100px;" type="text" value="1200000"/>	<input style="width: 50px;" type="text" value="40.0"/> %
<b>Matching Funds</b>		
Federal	<input style="width: 100px;" type="text" value="00"/>	<input style="width: 50px;" type="text" value="0"/> %
State (excluding the amount of this request)	<input style="width: 100px;" type="text" value="00"/>	<input style="width: 50px;" type="text" value="0"/> %
Local	<input style="width: 100px;" type="text" value="00"/>	<input style="width: 50px;" type="text" value="0"/> %
Other	<input style="width: 100px;" type="text" value="1,800,000"/>	<input style="width: 50px;" type="text" value="60"/> %
<b>Total Project Costs for Fiscal Year 2020-2021</b>	<b>3,000,000</b>	<b>100</b> %

8. **Has this project previously received state funding?**     Yes     No

If yes, provide the most recent instance:

Fiscal Year (yyyy-yy)	Amount		Specific Appropriation #	Vetoed
	Recurring	Nonrecurring		
<input style="width: 80px;" type="text" value="2019-20"/>	<input style="width: 80px;" type="text" value="00"/>	<input style="width: 100px;" type="text" value="500,000"/>	<input style="width: 80px;" type="text" value="2307A"/>	<input type="text" value="Yes"/>

9. **Is future-year funding likely to be requested?**     Yes     No

If yes, indicate nonrecurring amount per year.



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10. 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		
Expense/Equipment/Travel/Supplies/Other	Executive Director travel and miscellaneous expenses.	10,000
Consultants/Contracted Services/Study		
<b>Operational Costs: Other</b>		
Salary and Benefits		
Expense/Equipment/Travel/Supplies/Other	Marketing and statewide & regional training.	120,000
Consultants/Contracted Services/Study	Contracts with local United Ways and partner agencies hire coordinators to identify and secure sites and to provide services through certified IRS volunteers.	1,000,000
<b>Fixed Capital Construction/Major Renovation:</b>		
Construction/Renovation/Land/Planning Engineering		
<b>Total State Funds Requested (must equal total from question #6)</b>		<b>1,200,000</b>



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## 11. Program Performance

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

More than 30,000 low-to-moderate income working Floridians will be 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 activities and services will be provided to meet the intended purpose of these funds?

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

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

More than 30,000 low-to-moderate income Florida workers will receive assistance in preparing and filing their 2020 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.

- 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 will be 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 \$2.7 million in state and local sales taxes. Outcomes will be quantified primarily through official IRS reports and supplemented with data provided by United Ways 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?

Reducing or stopping payment.



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12. **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.**

N/A

13. **Requestor Contact Information**

- a. First Name  Last Name
- b. Organization
- c. E-mail Address
- d. Phone Number  Ext.

14. **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
- f. Phone Number

15. **Lobbyist Contact Information**

- a. Name
- b. Firm Name
- c. E-mail Address
- d. Phone Number  Ext.