

# FY2023 Buncombe County Strategic Partnership Grant Report

<b>Organization Name:</b>	OnTrack Financial Education & Counseling	
<b>Project Name:</b>	Free Tax Preparation: VITA	
<b>Reporting Quarter:</b> (Check one)		Quarter 1 (July 1, 2022 - September 30, 2022)
		Quarter 2 (October 1, 2022 - December 31, 2022)
		Quarter 3 (January 1, 2023 - March 31, 2023)
	x	Quarter 4 (April 1, 2023 - June 30, 2023)

## Narrative summary of grant related activities

Please provide a brief summary (no more than 1500 characters). You may attach supplemental documents if needed.

<b>Quarter 1</b>	<p>Q1 activities included recruiting VITA volunteers using OnTrack's email distribution list which went to community partners, supporters, and clients. We also publicized in the AVL Today and OLLI newsletters. The efforts resulted in 14 inquiries. Seven of those who inquired have already completed volunteer applications. Since we use a mentoring model for supporting new volunteers, we plan to invite 6-7 people to join the 14 returning volunteers for the 2023 filing season. We will refer those not joining our team to other VITA sites.</p> <p>Five experienced volunteers conducted 7 tax clinics during "back tax season," which is a time where we offer tax preparation services to clients who need returns from previous years completed. Volunteers filed 20 returns for 16 clients. These returns were more complicated than many of the returns volunteers prepare during the regular filing season, and volunteers supported clients with tasks like requesting W-2 transcripts, Cherokee tribe member income documentation, and gig economy income documentation.</p> <p>Program coordinator, Rebecca Strimer, strategized with VITA volunteers to overhaul the training program for new volunteers. The training program will provide more support for new volunteers' learning and application of tax law in the coming filing season.</p>
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<p><b>Quarter 2</b></p>	<p>Q2 activities included recruiting new and training all VITA volunteers on tax law, including changes for the new tax year. Our volunteer team stands at 19 people with six supervisor/leaders, seven returning volunteers, and five new volunteers - three more volunteers than we had last year. We instituted a structured training program with in-person sessions covering VITA applicable tax law. We held six sessions in total with three more planned for January prior to the start of tax preparation. New volunteer feedback indicates that the approach to training is effective and supportive for their learning.</p> <p>We have set a schedule for tax preparation services that will include seven 4-hour shifts per week with one shift on Saturdays and one shift on Thursday evenings. We will begin making appointments in mid-January. We have already updated our website with information for potential clients so they can start making plans for access our tax preparation services. NEW this year: We offered “first in line” sign-up for people to an email notification when appointments open up so they can book as soon as we have availability. Over 80 people are signed up! When we are ready to make appointments an email will go out to all clients in our distribution list as well as notify dozens of area nonprofit partners who serve eligible clients.</p>
<p><b>Quarter 3</b></p>	<p>In Q3 we began our regular tax season services with appointments starting on January 31st. By March 31st, volunteer tax preparers filed over 400 returns for Buncombe County tax clients and secured over half a million dollars in refunds. Pisgah Legal Services, which also operates a VITA program, markets VITA services widely and shares referrals with OnTrack WNC, ensuring widespread access to free tax preparation services. This partnership has grown the reach of both VITA programs.</p> <p>In February our tax volunteers participated in a training on implicit bias with Nicole Townsend from Davis Squared Consulting. The online training sparked deep conversations among volunteers, and the group used time in the March 21st Mid-Season Check In meeting to explore the topic more deeply.</p> <p>On March 12th we partnered with NC State Representative Caleb Rudow and Pisgah Legal Services to host a tax canvassing event. Rep. Rudow recruited volunteer canvassers to encourage people to file taxes. OnTrack's Rebecca Strimer and Mike McDonald from PLS provided the volunteers with training on the basics of the Earned Income Tax Credit and Child Tax Credits.</p>

<b>Quarter 4</b>	<p>Our most successful tax filing season in years closed on April 18th. Volunteers worked diligently to finish out the season, and they provided over 1,900 hours of service to OnTrack tax clients--the majority of whom are Buncombe County residents--over the course of this year. We're so grateful to Buncombe County for supporting this important work and helping clients to access valuable refunds and tax credits!</p> <p>On April 20th, we celebrated the volunteer team with a party, and on May 16th, the team gathered for the annual End of Season Debrief. This meeting focused on lifting up successes from the season and examining areas for improvement for the coming year. The group decided to introduce a new volunteer role that will welcome clients as they arrive for appointments and ensure their documents are in order for a smooth tax preparation process. They also developed new strategies for improving quality assurance processes that will further increase the accuracy of tax filing.</p> <p>In June, a small group of volunteers returned to OnTrack WNC to kick off the back tax season, serving 11 clients. June--September, volunteers will offer tax clinics for clients to get caught up on their filing needs.</p>
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## Progress toward annual goals

Measure	Annual Goal	Actual Results (Enter Data)				Progress toward Annual Goal
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	
Please only include new data for the specific quarter						
Number of tax clients and returns filed	325	20	0	434	177	631
Amount of tax refunds	\$ 475,000	\$ 28,271	N/A	\$ 516,345	\$ 121,562	\$ 666,178
Percentage of tax clients receiving EITC	30%	30%	N/A	30%	21%	30%
Tax fees saved	\$ 81,250	\$ 5,000	N/A	\$ 108,500	\$ 44,250	\$ 157,750

**Comments:**

We do not provide tax preparation services from October through December; the IRS takes down the tax preparation software during this time for yearly updates while all volunteers study and take the annual certification exams.

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## Use of funds to date and any budget considerations

Spending Category	Starting Budget	Total Spending (Enter Data)				Amount Remaining
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	
Personnel	\$ 11,700	\$ 2,154	\$ -	\$ 9,546	\$ -	\$ 0
Training						\$ -
Supplies/Materials						\$ -
Meetings						\$ -
Equipment/Furniture						\$ -
Printing/Marketing						\$ -
Licensing/Memberships/Dues/Subscriptions						\$ -
Client Support						\$ -
Contracts						\$ -
Professional Services						\$ -
Insurance and Bonds						\$ -
Building Maintenance						\$ -
List other cost						\$ -
List other cost						\$ -
List other cost						\$ -
<b>Total</b>	<b>\$ 11,700</b>	<b>\$ 2,154</b>	<b>\$ -</b>	<b>\$ 9,546</b>	<b>\$ -</b>	<b>\$ 0</b>

**Comments:**

Grant fully expended in 3Q. Thank you for your investment in this important project!