

FY2022 Buncombe County Strategic Partnership Grant Report

Organization Name:	OnTrack Financial Education & Counseling	
Project Name:	Free Income Tax Preparation	
Reporting Quarter: (Check one)	<input type="checkbox"/>	Quarter 1 (July 1, 2021 - September 30, 2021)
	<input type="checkbox"/>	Quarter 2 (October 1, 2021 - December 31, 2021)
	<input type="checkbox"/>	Quarter 3 (January 1, 2022 - March 31, 2022)
	<input checked="" type="checkbox"/>	Quarter 4 (April 1, 2022 - June 30, 2022)

Narrative summary of grant related activities

Please provide brief responses that fit within the box provided

Overall project updates:	<p>OnTrack's VITA program helped 125 Buncombe clients file 121 tax returns. Household income averaged \$27,853 (up slightly from 3Q). Tax refunds totaled \$154,308 for an average refund of \$1,753; refunds ranged from \$2 to \$11,005!! 39% received Earned Income Tax Credit (EITC) with the average EITC credit of \$1,265. Additionally, in 4Q 40 households received assistance from our FSA (Facilitated Self Assistance); we estimate at least 75% were Buncombe County residents; however, specific address information is not available given the nature of this service (email chats and phone Q&A with a VITA volunteer).</p> <p>In June, our wonderful volunteers reopened our VITA site for off-season tax preparation which will help people who need to file amended returns or back taxes from previous tax years. Now that the agency has reopened our offices, clients can once again come for in-person appointments.</p> <p>FULL GRANT: July 1, 2021 to June 30, 2022</p> <p>For FY22, OnTrack filed taxes for 414 Buncombe clients, 71% of whom received tax refunds which totaled \$596,309 (average \$2,042). Thirty-five percent (35%) received Earned Income Tax Credit which totaled \$202,021 (average \$1,403).</p>
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<p>Activities related to increasing equity, diversity and inclusion:</p>	<p>The racial equity audit recommendations from the Adaway Group continue to shape our work. Our 2022 Financial Literacy Luncheon included "The Business Case for Racial Equity" morning seminar led by Marsha Davis, local racial equity consultant who also received the Credit Where Credit Is Due Award at the event for her coaching with our agency's leadership team and training for the board. On June 10th, OnTrack's board finally held its retreat (which had been canceled in 2020 due to covid) with Marsha Davis facilitating the discussion of "DEI Why?" to create common language and goals around board diversity. July's marks the final month of the Adaway Group's "Whiteness At Work" training series for OnTrack's staff. With this foundational information and understanding, we will create a DEI statement using the one drafted by the Board's DEI committee as a starting point. Our Executive Director is participating in the monthly WNC DEI meetings which use the Global Diversity Equity & Inclusion Benchmarks as the structure for tackling 16 categories of DEI work (one topic per month) with guest speakers and small group discussion time. Since our leadership team is white, we are supporting our three BIPOC staff members with \$100 per month per BIPOC staff person which they can use to contract with an external mentor of their choosing. These are exciting times with lots of opportunities and promise for the future. In addition, we are looking for opportunities to support Black businesses. In addition to multiple contracts with Marsha Davis we rented the Black Wall Street space for the board retreat and had Clarence Robinson cater the lunch; Shammah Waller is our videographer for our Homebuyer Education Local module to supplement our online education, and Slay The Mic (STM Multi-media) filmed the awards presentation at the 2022 Luncheon.</p>
<p>Activities related to increasing operational excellence:</p>	<p>Even though Tax Coordinator, Rebecca Strimer, is now training as a financial/housing counselor, she continues her VITA responsibilities including creating the VITA schedule for volunteers, scheduling clients for tax appointments, and supporting the program. The ongoing the WNC Poverty Initiative means that our off season tax appointments serve a role in connecting low income clients with poverty remediation benefits. Rebecca and Pisgah Legal Services' VITA directors continue to meet weekly to share tips and strategies for managing capacity, tax issues, and overall VITA discussions.</p> <p>At OnTrack's 2022 Financial Literacy Luncheon, the 17 volunteers of VITA program from 2021&2022 were recognized as the VolunteerS of the YearS for their outstanding dedication and flexibility during two challenging tax seasons. Our clients and the community continue to benefit from their service. Our VITA program would not be possible without them and the County's funding helps makes this happen!</p>

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Progress toward annual goals

Measure	Annual Goal	Actual Results (Enter Data) Please only include new data for the specific quarter				Progress toward Annual Goal
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	
Number of Buncombe County clients assisted	400	2	0	277	135	414
Percent of clients that save \$200 or more as a result of VITA	90%	100%	N/A	98%	100%	100%
Percent of clients that receive EITC	30%	0%	N/A	40%	39%	40%

Comments:

We are pleased to have met all of our Annual Goals and thank Buncombe County for the support that ensures our VITA services are available to people in Buncombe County. This is our final year of SPG eligibility for this program. We welcome suggestions of other Buncombe County grant or contract opportunities to support this important work.

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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	\$ 18,000			\$ 18,000		\$ -
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						\$ -
Total	\$ 18,000	\$ -	\$ -	\$ 18,000	\$ -	\$ -

Comments: