

**PALM BEACH COUNTY
BOARD OF COUNTY COMMISSIONERS**

AGENDA ITEM SUMMARY

Meeting Date: March 11, 2008 [] **Consent** [X] **Regular**
 [] **Ordinance** [] **Public Hearing**

Department:
Submitted By: County Administration
Submitted For: County Administration

I. EXECUTIVE BRIEF

Motion and Title: Staff requests Board direction: regarding the United Way of Palm Beach County request for additional funding in the amount of \$105,000 to support the Prosperity Campaign Volunteer Income Tax Assistance (VITA) program for the 2008 income tax filing season. Currently, \$105,000 has been budgeted in FY 2008 to support this program.

Summary: The Prosperity Campaign VITA program was initiated in 2003 and was initially funded by the Quantum Foundation and Knight Foundation. These grants have ended and the United Way of Palm Beach County is requesting additional funding to assist in the continuation of this program. Without this additional support, the VITA Program would have to reduce the number of VITA service sites and significantly reduce the other services provided at these locations. Since 2003, Palm Beach County has financially supported this program and has allocated \$105,000 for the past three (3) years. In addition to this financial support, the United Way has partnered with the Department of Internal Revenue Service and other community service agencies. The total annual budget this fiscal year for the Prosperity Campaign Program is **\$1.2 million**, a majority of which is funded by the United Way. Since 2005, 28,000 tax returns have been processed free of charge and **\$48 million dollars** in tax refunds have been returned to Palm Beach County residents. Based on data from the Center for Urban and Economic Development, University of Illinois, this program has resulted in a **\$70 million dollar** economic impact on our community since 2005. Countywide (DN)

Background and Policy Issues: The United Way took the lead in working with other community groups to implement the Palm Beach County Prosperity Campaign for the first time in 2003. This significant program increased the prosperity of thousands of county residents through increasing the number of households receiving the Earned Income Tax Credit, increasing the number of households applying for and receiving food stamps, and increasing the number of families applying for Kid Care and who were automatically screened for Medicaid. Volunteer Income Tax Assistance (VITA) sites were set up throughout the County for eligible families to receive free income tax preparation and counseling or other assistance available to them.

Attachments:

Letter from United Way requesting additional funding

Recommended by: N/A

Department Director

Date

Approved By:

Assistant County Administrator

Date _____

II. FISCAL IMPACT ANALYSIS

A. Five Year Summary of Fiscal Impact:

Fiscal Years 2008 2009 2010 2011 2012

Capital Expenditures

Operating Costs

External Revenues

Program Income (County)

In-Kind Match (County)

NET FISCAL IMPACT

ADDITIONAL FTE

POSITIONS (Cumulative) _____

Is Item Included In Current Budget? Yes _____ No

Budget Account No.: Fund _____ Agency _____ Org. _____ Object _____
Reporting Category

B. Recommended Sources of Funds/Summary of Fiscal Impact:

If this request is approved, contingency funds will have to be allocated.

C. Departmental Fiscal Review:

III. REVIEW COMMENTS

A. OFMB Fiscal and/or Contract Dev. and Control Comments:

Jan. D. 1-29-08
OFMB
UD
11/29/08 01/15/08

Jan. J. 11/30/08
Contract Dev. and Control
E. 11/30/08

B. Legal Sufficiency:

N/A V90
Assistant County Attorney

C. Other Department Review:

Department Director

REVISED 9/95
ADM FORM 01

(THIS SUMMARY IS NOT TO BE USED AS A BASIS FOR PAYMENT.)

United Way of Palm Beach County

SCOTT B. BADESCH
President and CEO

January 16, 2008

Robert Weisman, County Administrator
Palm Beach County Government
301 North Olive, Suite 1101
West Palm Beach, FL 33401

Dear Mr. Weisman:

As you know, United Way of Palm Beach County and the Internal Revenue Service manage the Volunteer Income Tax Assistance (VITA) Program, as a part of the Palm Beach County Prosperity Campaign. This campaign is designed to help working families build net worth and achieve long-term economic stability.

As we discussed, the VITA program, along with our Prosperity Program, was initially funded by Quantum Foundation and Knight Foundation, which both have found the program to be outstanding. Unfortunately, these grants came to an end (they were time-limited Foundation grants), and we are now seeking funding support to continue this very important program and service. Accordingly, United Way is respectfully requesting the Board of County Commissioners to provide an additional \$105,000 beyond its current commitment of \$105,655, bringing the total county funding for the VITA Program to **\$210,655** for the 2008 Tax Filing Season. The total annual budget of the Prosperity Campaign is \$1.2 million a year, the majority of which is covered with United Way funding. Without this support, the VITA program would have to examine reductions in services at a time when far too many of the county's residents are having difficulties with their financial stability.

This program has been recognized nationally as a community development best practice and is now being replicated in many communities. Since 2005, 28,000 tax returns have been processed free of charge for households earning less than \$39,000; \$48 million in tax refunds has been returned to residents; 65 households have become new homeowners, 228 participants have opened a matched based savings program for homeownership; and 4,100 participants have received supportive services (including credit counseling, financial literacy workshops, educational courses and crisis case management). We see a significant reduction in need for basic food, rent assistance, and utility assistance during the immediate period after people get their tax refunds. We know from our review that families are using their tax refunds for basic necessities of life and to enhance their economic status. Without our help, this wouldn't occur, and there would be greater demand for services from the government, faith-based and nonprofit agencies all having difficulties in funding needed programs.

The VITA Program is the point of entry from which the Prosperity Campaign achieves its purpose through four one-stop centers throughout Palm Beach County with the goal of transforming and stabilizing our most needy community and families.

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The impact of the VITA program on the local economy has been remarkable. Based on data from the Center for Urban and Economic Development, University of Illinois, our Earned Income Tax Program alone has resulted in a \$70 million economic impact from 2005 to the present. Furthermore, \$8 million has been invested in homeownership. As is the practice of our United Way, these outcomes have been accomplished with administrative costs not exceeding 11.5%.

I have attached documents detailing the results of the program within Palm Beach County. If you have any questions please do not hesitate to call me at (561) 375-6613.

I thank you for your support of this request.

Sincerely,



Scott B. Badesch
President and Chief Executive Officer

cc: Commissioner Addie Greene, Chair, Palm Beach County Board of County Commissioners
Commissioner Jeff Koons, Vice Chair, Palm Beach County Board of County Commissioners
Commissioner Karen Marcus, Palm Beach County Board of County Commissioners
Commissioner Robert J. Kanjian, Palm Beach County Board of County Commissioners
Commissioner Mary McCarty, Palm Beach County Board of County Commissioners
Commissioner Burt Aaronson, Palm Beach County Board of County Commissioners
Commissioner Jess R. Santamaria, Palm Beach County Board of County Commissioners

United Way of Palm Beach County, Inc.

Prosperity Campaign

United Way seeks to improve measurably the lives of individuals and families in Palm Beach County by uniting the resources of donors, volunteers, agencies and the community. Through the Prosperity Campaign, United Way of Palm Beach County helps working families and low-income residents move toward greater economic stability, higher earnings and homeownership. The Campaign has three elements: Volunteer Income Tax Assistance (VITA), Individual Development Accounts (IDA) and Prosperity Centers.

Volunteer Income Tax Assistance (VITA) Sites

More than 25 VITA sites across Palm Beach County provide free tax preparation services to those with an annual household income of \$40,000 or less. The site locations range from Boca Raton to Jupiter and west to the Glades and are staffed by volunteers trained and certified by the Internal Revenue Service (IRS). For tax year 2006, more than 10,000 Palm Beach County residents had their taxes filed for free at a VITA site. The program helped Palm Beach County community members receive more than \$14 million in tax refunds, including \$5.6 million in Earned Income Tax Credits. In addition, through the free tax service, residents saved \$1 million in filing fees.

Individual Development Account (IDA) Program

The IDA Program is a matched-based savings program to help purchase a home or start a small business. Upon entering the Program, the eligible participant demonstrates the ability to save over a minimum of a 6 month period. Upon completion in the Program and accumulating \$2,000 in savings, the money is matched 2:1. The participant is given \$4,000 for a total of \$6,000 toward the purchase of a home or to start a small business.

Prosperity Centers

The Prosperity Centers (located throughout Palm Beach County) offer residents a one-stop source of services. These services include:

- Free Tax Preparation Services
- Credit Counseling & Financial Literacy
- Money Management & Budget Development
- Educational & Career Counseling
- First-time Homebuyer Education & Assistance
- Micro-Enterprise Education & Assistance
- Asset Building through savings and banking basics
- Individual Development Account Program
- Family Support Services (crisis case management)
- Legal Aid for Elders
- Benefits Screening – with access to food stamps, Kidcare, Medicare, Medicaid, etc.
- Benefits Planning – provides one-on-one counseling and education about disability benefits and the impact of employment on those benefits

United Way of Palm Beach County
Volunteer Income Tax Assistance Program
January 2008

VITA Returns By Zip Code (TY 2006):
(descending from greatest to least returns completed)

Sites:	# Returns:	# Sites
• West Palm Beach	2,877	11
• Lake Worth	1,274	3
• Belle Glade	1,256	3
• Royal Palm Beach	720	1
• Greenacres	610	2
• Riviera Beach	597	4
• Delray Beach	594	3
• Jupiter	537	1
• Boynton Beach	542	1
• Boca Raton	320	1
• Pahokee	292	2
• Wellington	227	1
• Lantana	160	1
• South Bay	121	1

2008 VITA Sites

Site	Address	City	Zip Code	Operating Hours	Languages	Directions	Disable Facilities
United Way Prosperity Center - Belle Glade	Glades Pioneer Terrace 200 Dorothy G Wilford Circle	Belle Glade	33430	Mon. 9:30am-2:30pm; Tues.2:30pm-8:00pm; Wed 2:30pm - 8:00pm; Thurs. 2:30pm-8:00pm; Fri.10:00am - 1:00pm; Holiday: Closed February 18 Site Closing: April 14	Spanish	Located behind Winn Dixie	Yes
Palm Beach County Division of Senior Services - Belle Glade	2916 ST Road 15	Belle Glade	33430	Mon. - Fri. 8:00am - 5:00pm By Walk in and Appt *Schedule an appt. by calling Joe Horvath at 561-996-4808	English		Yes
Lois Martin Community Center	1350 North Dixie Hwy.	Boca Raton	33432	Mon. 6:00pm - 8:30pm; Tues. 6:00pm - 8:30pm; Thurs. 6:00pm - 8:30pm; Sat. 9:00am - 12:00pm; Holiday: Closed February 18 Site Closing: April 14	Spanish	North of Glades Rd.	Yes
Forest Park Beacon Center Forest Park Elementary School	2501 Seacrest Blvd.	Delray Beach	33444	Mon. 5:00pm - 8:00pm; Wed. 5:00pm - 8:00pm; Thurs. 5:00pm - 8:00pm; Holiday: Closed February 18 Site Closing: April 14	Creole	Located at the old Atlantic High School	Yes
Pompey Park Community Center	1101 NW 2nd St.	Delray Beach	33444	Mon. 9am - 1pm and 5:30pm - 8:30pm; Tues.9:00am - 1:00pm; Wed. 5:30pm - 8:30pm; Sat. 9:00am - 1:00pm Holiday: Closed February 18 Site Closing date: April 14	English	Between NW 2nd and NW 13th Ave.	Yes
United Way Prosperity Center - Delray Neighborhood Resource Center	141 SW 12th Avenue	Delray Beach	33444	Mon. thru Fri. 9:00am - 12:00pm <u>AND</u> 1:00pm - 4:00pm. Holiday: Closed February 18 Site Closing: April 14	English	From I-95, East on W Atlantic Ave., South on SW 12th Ave.	Yes
Coalition for Independent Living Options (CILO)	6800 Forest Hill Blvd.	Greenacres	33413	Tues.5:30pm-8:00pm; Thurs. 5:30pm - 8:00pm; Sat. 8:00am - 12:00pm; Holiday: Closed February 18 Site closing date: April 14	Spanish	Right in front of River Bridge Development just West of Jog Rd.	Yes
West Jupiter Community Center	6401 Indiantown Rd.	Jupiter	33458	Mon. 6:00pm - 8:30pm; Tues. 6:00pm - 8:30pm; Thurs. 6:00pm - 8:30pm; Sat. 10am - 2pm; Holidays: Closed Feb. 18 Site closing date: April 14	English	North East corner of Central Blvd. and Indiantown Rd.	Yes
Adopt-A-Family of the Palm Beaches	1712 2nd Avenue North	Lake Worth	33460	* Appt. only call Miriam at 253-1361 to schedule. Open: Tues. Jan 29 5pm - 9pm; Thurs. Jan. 31 5pm - 9pm; Mon. thru Thurs. Feb. 4-14th 5pm - 9pm; Sat. & Sun. Feb. 2,3,9,10,16,17 10am-4pm; Feb. 19 - April 13: Tues. & Thurs. 5pm - 9pm and Sat & Sun 10am - 4pm Holiday: Site Closed Feb. 18 Site Closing: April 14	English, Spanish	From Lucerne Ave, go North on North A St. to 2nd Ave., go west on 2nd Ave.	Yes
Palm Beach Habilitation Center	4522 Congress Ave.	Lake Worth	33461	Tues. 5:00pm - 8:00pm; Wed. 5:00pm - 8:00pm; Thurs. 5:00pm - 8:00pm; Sat.10:00am - 2:00pm; Holiday: Closed Feb. 18 Site closing date: April 14	English	South East corner of 6th Ave. and Congress Ave.	Yes
Chancellor Charter School	600 South East Coast Ave.	Lantana	33462	Tuesday 5:30pm - 8pm; Sat. 10:00am - 1:00pm; Holiday: Closed Feb. 18 Site closing date: April 14	English	From Dixie Hwy go West on Hypoluxo Rd., pass the rail road, go south on Warehouse Ave	Yes

Youth Co-op, Inc.	2112 S. Congress Ave. (ste. 102)	Palm Springs	33406	* Appt only - Call Lisa at 964-1693 for dates and times	English	Less than a mile south of Forest Hill Blvd on east side of road.	Yes
United Way Prosperity Center - Pahokee	560 East Main Street	Pahokee	33476	Mon. 4:00pm - 7:00pm; Wed. 4:00pm - 7:00pm; Fri. 4:00pm - 7:00pm; Sat.10:00am - 1:00pm; Holiday: Closed Feb. 18 Site closing date: April 14	Spanish	At Pahokee Elementary School	Yes
Lindsey Davis Senior Community Center	1550 West 28th St.	Riviera Beach	33404	Mon. 4:30pm - 7:00pm; Tues. 4:30pm -7:00pm; Wed. 4:30pm - 7:00pm; Thurs. 4:30pm -7:00pm; Sat.10am-1pm; Holidays: Closed Feb. 18 Site closing date: April 14	English	North West corner of Avenue R and West 28th St., Parking in the back	Yes
Royal Palm Beach Recreation Center	100 Sweet Bay Lane	RPB	33411	Tues. 5:00pm - 8:00pm; Wed. 5:00 - 8:00pm; Thurs. 5:00pm - 8:00pm; Sun. 1:30pm - 4:00pm; Holiday: Closed Feb. 18 Site closing date: April 14	Korean, Thai, Chinese	At the West end of Crestwood Middle School	Yes
Glades Covenant Church	248 US Highway 27 South	South Bay	33493	Mon. 5:00pm - 8:00pm; Thurs. 5:00pm - 8:00pm; Sat.10am - 2pm; Holiday: Closed Feb. 18 Site closing date: April 14	Spanish	Right Next to City Hall	Yes
Wellington Community Center	12165 West Forest Hill Blvd.	Wellington	33414	Tues. 5:00 - 8:00pm; Wed. 5:00pm - 8:00pm; Sat.10:00am - 2:00pm; Holiday: Closed Feb. 18 Site closing date: April 14	English	On West side of Forest Hill Blvd. near Publix	Yes
Gramercy Village Weed and Seed	5104 45th Street	WPB	33407	Mon. 5:00pm - 8:00pm; Holiday: Closed Feb. 18 Site closing date: April 14	English	Just East of Haverhill; Right next to Robinson Village Housing Complex	Yes
Gulfstream Goodwill	1715 Tiffany Drive East	WPB	33407	Mon. 10:00am-2:00pm; Tues. 4:00pm-7:00pm; Wed.10:00am-2:00pm; Thurs. 4:00pm-7:00pm; Fri.10:00am-2:00pm; Holiday: Closed Feb. 18 Site closing date: April 14	English	East of Congress Ave. on South side of 45th St.	Yes
United Way Prosperity Center - Pleasant City Multi-Cultural Center	501 21st St.	WPB	33407	Tues. 1:00pm - 8:00pm; Thurs.1:00pm - 8:00pm; Sat.10:00am - 2:00pm; Holiday: Closed Feb. 18 Site closing date: April 14	English	On the west side of Pleasant City Elementary School, site on 2nd floor	Yes
Urban League of Palm Beach County	1700 North Australian Avenue	WPB	33407	Wed. 6:00pm - 9:00pm; Sat. 9am - 5pm; Holiday: Closed Feb. 18 Site closing date: April 14	English	Across from Gaines Park	Yes
Vicker House North	811 Palm Beach Lakes Blvd.	WPB	33401	Mon. 9:00am - 3:00pm; Tues. 9:00am - 3:00pm; <u>Walk-in/Appointment ~ For Appointment call: (561) 804-4970;</u> Holiday: Closed Feb. 18 Site closing date: April 14	English	North East corner of Palm Beach Lakes Blvd., and Spruce	Yes
Vicker House South	3801 Georgia Ave.	WPB	33405	*Appointment Only call: (561) 804-4975; Tues. 1:00pm - 8:30pm; Wed. 1:00 - 7:00pm; Thurs. 1:00 - 8:30pm; Sat. 9:00am - 12:00pm; Holiday: Closed Feb. 18 Site closing date: April 14	Spanish	Between Roseland Dr. and Southdale Rd.	Yes
Westgate Beacon Center Westgate Elementary	1545 Loxahatchee Dr.	WPB	33409	Tues. 5:00 - 8:00pm; Thurs. 5:00 - 8:00pm; Sat. 10:00am - 2:00pm; Holiday: closed Feb. 18 Site closing date: April 14	Spanish	Loxahatchee Dr., and Oswego Ave.	Yes