

# FY2021 Buncombe County Strategic Partnership Grant Report

<b>Organization Name:</b>	<b>OnTrack Financial Education &amp; Counseling</b>	
<b>Project Name:</b>	<b>Free Tax Preparation through Volunteer Income Tax Assistance (VITA)</b>	
<b>Reporting Quarter:</b> (Check one)		Quarter 1 (July 1, 2020 - September 30, 2020)
		Quarter 2 (October 1, 2020 - December 31, 2020)
		Quarter 3 (January 1, 2021 - March 31, 2021)
	XX	Quarter 4 (April 1, 2021 - June 30, 2021)

## Narrative summary of grant related activities

<b>Overall project updates:</b>	<p>When the tax filing deadline move to May 17th, we were able to glean more benefit from the time, energy and investment we made in shifting our VITA program to virtual service delivery. Our incredible volunteers didn't hesitate to agree to extend their schedules to help more low-income taxpayers. For the full grant period:</p> <ul style="list-style-type: none"> <li>•\$404,412 in refunds for Buncombe County tax clients</li> <li>•29% of clients received Earned Income Tax Credits which totaled \$119,699</li> <li>•19% received Child Tax Credits for a total of \$88,615</li> </ul> <p>We offered Facilitated Self Assistance (FSA) to support people who are doing their own taxes but need help. With FSA people can email our tax team to get answers to their questions. Through FSA we assisted 258 taxpayers, offered 165 consultations with clients, and provide resource/referral information to an additional 20 clients. [Totals reported on the Results tab include tax returns completed + FSA assistance.]</p>
<b>COVID-19 impacts:</b>	<p>Remote work: Not being able to offer in-person tax preparation impacted our VITA site this year and the shift to a remote Tax Program was time consuming and intense. Given the challenges of the season, we asked our VITA volunteers to respond to an anonymous survey to get their feedback and suggestions. The investment we made in shifting to virtual/online service delivery paid off; while most want to come back to in-person services next year, 92% think we should continue to offer virtual tax appointments as an option. 77% were satisfied, very satisfied or extremely satisfied with their volunteer experience at OnTrack (quite remarkable given all the challenges of this tax season); 83% indicate they will likely volunteer with OnTrack again next year. Volunteer survey comments included: "The teamwork that I experienced throughout the season was outstanding." "I liked working from home on a flexible schedule and not having to prepare the returns on demand." "I really had fun with my clients on Zoom." "The clients were so good natured about the changes to the program this year." "I enjoyed learning new technology."</p>

<p><b>Activities related to increasing equity, diversity and inclusion:</b></p>	<p>On June 9th we began our racial equity audit with The Adaway Group with a meeting with OnTrack leadership and their team. The focus of the audit is to identify areas where white supremacy culture shows up and to give us tools to address them. We provided policies, procedures, sample job postings, evaluation/compensation practices, online client screening/budget information, employee handbook, program information and more! Our goal is to increase diversity, equity and inclusion for clients, staff, and board. We have asked for evaluation of our workplace culture, recruiting/hiring, training, supervision, and evaluation so we can create an environment for BIPOC staff to thrive and succeed. We look forward to gaining insights from their work and finding opportunities to improve our work with clients, staff, and the community.</p>
<p><b>Activities related to increasing operational excellence:</b></p>	<p>Our VITA volunteer tax preparers are an important asset to our program and this year was challenging. Many were using this technology for the first time, and we all (staff and volunteers) struggled with it mightily at the beginning of the season. What started out as one of our greatest challenges, turned into a big success. In the end of tax season survey, to the question “How would you rate your comfort level with our technology (Zoom, Outlook, OneDrive, etc.)?” the responses averaged an 8.9 on a scale of 1 to 10. It was amazing to see Volunteer’s confidence surge as they learned the technology. These are skills that they can take with them. The volunteers who serve a “Tax Program Shift Supervisors” provided countless hours ensuring the VITA program offers high quality, excellent service to tax clients. Staff used feedback of volunteers and clients to improve our systems and approach; this increased our operational excellence as illustrated in the volunteer survey response showing a 56% improvement in tax procedures from the beginning of the season until the end of the season.</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	
# of Buncombe County clients assisted	516	3	0	344	159	506
% of clients that save \$200 or more as a result of VITA	90%	100%	NA	100%	96%	99%
% of clients that receive Earned Income Tax Credit	30%	0%	NA	30%	27%	29%

### Comments:

We hope you'll agree that it is remarkable that - after the year of COVID-19 scare, remote work, incredible shift to online/virtual service delivery and the American Rescue Plan which required us to schedule second appointments with clients who needed to file amended returns -- we are 98% of our goal! Only 10 tax returns shy of 516 Buncombe County residents filing their taxes through our VITA site. An additional 100 people received assistance through direct consultation with our tax shift supervisors and referrals to resources by our Tax CSR.

At our end-of-the-season Tax Program Recognition (everyone was vaccinated so we could hold it in-person), we recognized three of our volunteer tax preparers for over 10 years of VITA experience! OnTrack is truly blessed with remarkable, caring, committed volunteers!

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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 Jan-Mar 2021	Quarter 4	
Personnel	\$ 4,658	\$ -	\$ 4,658	\$ -	\$ -	\$ 0
Training						\$ -
Supplies/Materials	\$ 377		\$ 377	\$ -	\$ -	\$ (0)
Meetings						\$ -
Equipment/Technology	\$ 7,865		\$ 7,865	\$ -	\$ -	\$ 0
Printing/Marketing						\$ -
Licensing/Memberships/Dues/Subscriptions						\$ -
Client Support						\$ -
Contracts						\$ -
Professional Services						\$ -
Insurance and Bonds						\$ -
Building Maintenance						\$ -
<b>Total</b>	<b>\$ 12,900</b>	<b>\$ -</b>	<b>\$ 12,900</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

**Comments:**