

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 checked="" type="checkbox"/>	Quarter 3 (January 1, 2022 - March 31, 2022)
	<input 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>We are pleased to report that January - March, our tax program has served 277 Buncombe tax clients with 243 returns.</p> <p>This quarter, Buncombe tax clients' household income averaged \$26,19. Two hundred (200) received tax refunds totaling \$472,755 for an average refund of \$2,364; refunds ranged from \$2 to \$13,960!! 40% of received Earned Income Tax Credit with the average EITC credit of \$1457.</p> <p>Here's a FANTASTIC example of how our VITA volunteers are creative problem solvers and the importance of Buncombe County's dollars in ensuring our services are available to the community: Client Iris** worked with tax volunteer Ali. After starting the return, Ali realized that Iris was not eligible for traditional VITA services because the unemployment income she received caused a unique situation that is out of scope for VITA. Instead of sending Iris on her way to find a different tax preparation service, Ali connected her with VITA's Facilitated Self Assistance service. This service allows clients to complete their own tax return and ask a VITA volunteer questions along the way. Ali also realized that Iris's situation as a full-time student would make it beneficial for her and her parents to coordinate their tax returns. Ali looked up when Iris's parents were coming to VITA for the tax appointment and invited Iris to bring her laptop to the office at the same time. Ali ensured that their returns were coordinated and their credits and refunds were maximized.</p> <p>Iris said, "Ali was there for us from start to finish, even after the finish really. She emailed after we met to be sure everything went through for me and my parents. If I had filed on my own, I wouldn't have gotten much back. But with VITA at OnTrack my parents and I got a nice refund. My taxes were pretty complicated for someone my age, and Ali explained everything really well. Even with a language barrier because my parents speak only Spanish, Ali took the time to be sure our family understood what was happening." [**name changed]</p>
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<p>Activities related to increasing equity, diversity and inclusion:</p>	<p>We are continuing to move forward with recommendations from the Adaway Group racial equity audit. These recommendations are helping us understand diverse community needs, focus on relationship building, and get proximate with work already going on in community. This is helping to inform our approach to staff training and community outreach. As a team, our staff is participating in "Whiteness At Work," an Adaway Group training series that helps individuals and organizations identify and address white supremacy culture and blind spots that negatively impact our work and working environment.</p> <p>OnTrack's board of directors will hold a retreat in June facilitated by Marsha Davis and focused on why board diversity is important. This effort is being led by two board committees: DEI and board engagement.</p>
<p>Activities related to increasing operational excellence:</p>	<p>In preparation for and throughout the tax season, Rebecca has been meeting with Pisgah Legal Services' VITA team to share tips and strategies for managing capacity, tax issues, and overall VITA discussions.</p> <p>Our move to offer the option of "Drive-in, Drop-off & Wait" has met a huge need. After our site opened in late January VITA coordinator, Rebecca Strimer, talked with two tax clients who reported paying \$250 and \$350 in 2021 to have their taxes paid; another couple said they had NOT filed taxes in 2021 because they weren't able to use the virtual option or find another tax site to prepare their returns (We have this couple on the list to do "back taxes" once our off-season tax services open.)</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		279
Percent of clients that save \$200 or more as a result of VITA	90%	100%	N/A	98%		99%
Percent of clients that receive EITC	30%	0%	N/A	40%		40%

Comments:

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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: