

Lead Agency: Commission on
Program Offer Type: Existing Operating
Related Programs:

Program Contact: Josh Todd

Program Characteristics:

Executive Summary

The Family Economic Security Project helps working families claim the Advance Earned Income Tax Credit (AEITC) and other available state/federal tax credits. We also work with employers to provide free tax preparation assistance and financial literacy at the workplace. This project will involve 50 local employers, provide direct tax preparation assistance to 1000 employees and secure \$1.26 million in federal and state tax benefits for low- and moderate-income families.

Program Description

The Advance EITC enables low- and moderate-income workers with children to receive part of their federal tax credit in their paychecks throughout the year, instead of waiting until they file their taxes. This proposal gives direct assistance to employers to set up workplace Advance EITC campaigns, which includes free tax assistance for employees, tax credit information, and financial education resources. Specific activities under this proposal include:

- (a) County staff and a contracted provider work with local employers to provide information and support for company sponsored AEITC campaigns, informing their employees about the program and helping with enrollment.
- (b) Employees access free tax preparation services, thus avoiding costly fees for tax preparation and predatory "refund anticipation loans."
- (c) Employees receive financial education through materials and workplace education sessions.

Performance Measures

Measure Type	Primary Measure	Previous Year Actual (FY08-09)	Current Year Purchased (FY09-10)	Current Year Estimate (FY09-10)	Next Year Offer (FY10-11)
Output	Number of employers participating	30	40	40	50
Outcome	Participants whose yearly income is lifted above FPIG	400	600	700	700
Outcome	Increase in families who use free tax prep services	12.0%	25.0%	25.0%	25.0%
Efficiency	Dollars leveraged per county dollar ratio	12	12	12	12

Performance Measure - Description

- **• Outcome information is based on current FES Project data on average refund per household.
- Percentage increase is based on IRS figures for number of households who utilized free tax preparation sites in Multnomah County in 2008.
- New leverage ratio based on FES Project actual performance data.

FPIG= Federal Poverty Income Guidelines

Legal/Contractual Obligation

Multnomah County's 6-Year Plan to Improve Outcomes for Children & Families prioritizes increasing low and moderate income families' income as 1 of 2 critical goals for Multnomah County for the planning period 2008-2014.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2010	2010	2011	2011
Personnel	\$30,993	\$0	\$14,296	\$0
Contracts	\$36,800	\$0	\$40,822	\$0
Materials & Supplies	\$993	\$0	\$13,133	\$0
Total GF/non-GF:	\$68,786	\$0	\$68,251	\$0
Program Total:	\$68,786		\$68,251	
Program FTE	0.10	0.00	0.13	0.00
Program Revenues				
Total Revenue:	\$0	\$0	\$0	\$0

Explanation of Revenues

The program offer is funded through County General Fund and leverages federal and state revenue through the increases in tax returns received by low and moderate income Multnomah County residents. Research shows that low and moderate income families and individuals are more likely to spend their tax refunds so this offer represents a significant investment in economic development.

Significant Program Changes

Last year this program was: #10011, Family Economic Security