

IMPACT STATEMENT

Legislation title: *Authorize a grant agreement with CASH Oregon for \$78,786 to provide financial education, counseling and free tax preparation services to low-income families and individuals in Portland (Ordinance)

Contact name: Susan Crabtree

Contact phone: 503-823-6819

Presenter name: n/a

Purpose of proposed legislation and background information:

Across the state, 1,174 AARP Tax-Aide volunteers assisted over 58,000 taxpayers, resulting in over \$54 million in refunds. With the City of Portland's FY16-17 grant, CASH Oregon was able to conduct EITC outreach and facilitate the delivery of free tax preparation services to individuals and families earning less than \$50,000 within the City of Portland.

Financial and budgetary impacts:

Funding for this grant is available in the FY2017-18 budget in the General Fund Special Appropriations.

Community impacts and community involvement:

CASH Oregon Staff conducted intensive recruitment, training, and retention efforts which resulted in 496 volunteers who successfully trained to become IRS-certified volunteer tax preparers in the Tri-County area. 31% of our volunteers spoke a foreign language. CASH Oregon continues to strive toward service to a more diverse community. Four years ago they adopted a strategic plan which emphasized this on-going goal. 79% of the tax filers this year came from communities of color.

Budgetary Impact Worksheet**Does this action change appropriations?**

☐ **YES:** Please complete the information below.

☒ **NO:** Skip this section

Fund	Fund Center	Commitment Item	Functional Area	Funded Program	Grant	Sponsored Program	Amount

Impact Statement for Requested Council Action
