

SECTION I: Cover Sheet

APPLICANT INFORMATION

Organization Name:	United Way of Albany County
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Type of Organization:
<input type="checkbox"/> Recreation/ Arts and Culture <input type="checkbox"/> Civic/Quasi-Governmental
<input checked="" type="checkbox"/> Social Service <input type="checkbox"/> Other _____

Requested Amount for FY22/23: City \$2,000.00 County \$4,000.00

Will this amount be used to leverage additional funds either through grants or other means?
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
If you marked "yes", indicate the amount of additional funds that will be leveraged and note whether these are estimated or actual.
\$6,500 <input checked="" type="checkbox"/> Estimated <input type="checkbox"/> Actual

<p>Description of request: Using the space below, <i>briefly</i> describe how your organization will use these funds and how the proposed program/project will benefit the community. A more detailed description is requested in <u>Section III</u></p> <p>The requested funds are to support the Albany County VITA (Volunteer Income Tax Assistance) Program in 2022/2023. This program is possible because of partnerships between the United Way of Albany County, the University of Wyoming Department of Accounting, and the Laramie Plains Civic Center. Funds from this grant cover administrative costs, advertising, equipment, program supplies, and training costs. VITA provides free income tax preparation for Albany County households with low and moderate incomes at no charge. Sessions are held at the Laramie Plains Civic Center in the South Gym from early February to April 15. We expect to complete between 700-750 tax returns, at no charge, saving residents an estimated \$125,000 in tax preparation fees. The total of refunds expected, from the 700-750 tax returns, is between \$800,000-\$1,000,000. These refunds are then spent throughout the community on such necessities as food, clothing, housing, transportation. The city and county will see most of this money come back in the form of increased business and increased sales tax receipts.</p>
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Declaration: I hereby certify that the information give in this application for Community Partner funding is true and correct to the best of my knowledge.

Agency Director Evelyn Edson Evelyn Edson 2/20/2022
Signature Print Name Date

Board President Dan Pasman Dan Pasman 2/20/2022
Signature Print Name Date

SECTION II: Organization History

Organizational History and Mission

Provide a mission statement and brief history of your organization in Laramie and/or Albany County, including services provided to area residents.

The United Way of Albany County (UWAC) was established in 1958 with a mission to increase the organized capacity of people to care for one another. Our primary goals are to raise funds for other human service nonprofits and to fill in gaps in our human services network. In this capacity, the UWAC has gone from raising \$35,830 in 1958 to raising \$540,000 this past year. Through our 64-year history we have raised over 14 million dollars to aid and assist such agencies as ARK Regional Services, Laramie Interfaith, and Hospice of Laramie. Last year, we funded 16 separate agencies. These agencies form the heart and soul of human services in our county.

The Albany County VITA program started in 2005. Today, this program is supported by United Way of Albany County, the University of Wyoming Department of Accounting, Bank of the West, First Interstate Bank Foundation, the City of Laramie, Albany County, and the Laramie Plains Civic Center. The primary goals of the Albany County VITA Program are to inform the general public about the Earned Income Tax Credit (EITC) and other tax credits that benefit low-to-moderate income taxpayers, and to provide free income tax preparation assistance to these same taxpayers. Each year, the program reaches new members of the community, while also assisting numerous returning clients that rely on the free tax assistance. Since its inception, the program has completed over 9,300 federal and state tax returns for Albany County residents. In that time, refunds have exceeded 10 million dollars while saving local low-income residents over 1 million dollars in tax preparation fees.

With the help of the University of Wyoming Department of Accounting, and the Laramie Plains Civic Center, the VITA program continued to assist community members in 2020 and 2021. Additionally, the services provided during our session proved to be important resource for individuals who made under \$12,000. To receive COVID stimulus check and the Earned Child Income Tax credit, individuals needed to file or register with the IRS despite the level of their income. As a result, individuals making under \$12,000, who typically do not file income tax returns, needed the free assistance of trained VITA volunteers. These community members were able to access stimulus checks brining thousands of dollars back to Albany County.

This year, with the continued COVID-19 procedures to protect the staff, volunteers, and community member, we have been able to provide the VITA program to Albany County residents since February 2021. Through an online scheduling program, community members can schedule a socially distanced appointment to file their taxes at no cost. Since February 2, 2022, the VITA program has provided roughly 80 returns. 20 of the 80

returns received an earned income credit of an average of \$2,468. As of February 19, 2022, this program has helped to return \$131,190 into the hands of the City of Laramie and Albany County residents.

Organizational Structure

List your officers and director(s), indicating their terms of office

Please See Attached Document

SECTION III. *Funding Request Justification*

Briefly explain how the funds will be used and why public funds are necessary to accomplish this goal. Some discussion items to cover in this section may include:

- *whether or not the funding request has increased from prior years;*
- *whether or not this is a one-time or on-going request;*
- *description of any large program or staff expansion occurring in this fiscal year;*
- *large equipment or other fixed assets that will be purchased fiscal year;*
- *how your project relates to city or county goals or improves the overall quality, character or health of the community; and*
- *whether or not funding will be used to leverage additional monies for your organization either through grants or other means*

The Albany County VITA program has helped file over 9,300 tax returns since it first began in 2005. Cumulative refunds exceed \$10 million and clients have saved over 1 million dollars in tax preparation fees. Over 90% of the returns are current year federal returns, and the other return are either amended returns, past year returns, or out of state returns. In 2022 our current return average is in excess of \$2,000, with some being as high as 9, 10, 15 thousand dollars. The program is designed to help households with incomes of less than \$60,000 (exceptions are made to the income limitation on a case by case basis). For the past 10+ years the program has averaged helping 700 households annually.

Last year, due to the COVID-19 pandemic, we continued to limit the number of individuals in the Civic Center Gym by requiring appointments. For this reason, our numbers for 2021 are lower than normal. In 2021, VITA volunteers filed 412 community member's tax returns files bringing \$660,213 back to Albany County.

Benefit to Community

This program is important to the community because it addresses a need and can improve the quality of life for Albany County residents.

First, many individuals and families in Albany County earn a low-to-moderate income and are unable to pay for professional tax filing assistance. In addition, a common misconception is that lower income households only need simple tax filing. Yet, tax filing can still be complicated, no matter how simple the return. For example, even the form for the Earned Income Tax Credit, designed to benefit low-income households, is far from easy to complete. Often residents do not have the resources or knowledge needed to file their returns correctly, resulting in loss of a refund or problems with the IRS. This program ensures that our residents can feel confident in their tax filing.

Second, the program's focus on the Earned Income Tax Credit (EITC) and other refundable credits also benefits the community. The EITC is a refundable tax credit specifically for low-to-moderate income working individuals and families, particularly those with children. The credit depends on the client's income and number of children. The EITC encourages and rewards working families, offsets federal payroll and income taxes, and helps to meet basic needs. The credit is among the nation's strongest tools to promote work and help workers escape poverty and achieve self-sufficiency. A majority of our clients receive this credit. Many others receive the Child Tax Credit, and/or an education credit.

Third, the program benefits the community by assisting families and individuals in filing an accurate return and in receiving the correct refund. Volunteer income tax assistance programs similar to the Albany County VITA program have been shown to have a 94 percent accuracy rate nationwide, according to the Corporation for Enterprise Development. With the inclusion of the UW Accounting Department, and Professor Amber Mercil, our local accuracy rate probably surpasses the national percentage. In addition, research has shown that taxpayers who do not have access to a free tax preparation program often turn to unregulated, for-profit tax preparers. In America, 55% of for-profit tax preparers are unregulated and non-credentialed. Our free tax preparation program is different. Our program has a trained and IRS-certified site coordinator and trained and certified volunteer tax preparers. Additionally, the program consistently assists clients with amended or past year returns that were originally completed incorrectly by a paid tax preparer.

Fourth, refunds provided to tax filers who use the program is money that is spent locally to pay for necessities. Families and individuals commonly use the refund to open a bank account, pay bills, or receive job training, leading to a greater self-sufficient. In fact, the EITC is currently the single most successful federal program in terms of moving people out of poverty.

Lastly, the free tax preparation program also provides needed financial education to the community, especially during times where legislation causes big changes to tax filing. Financial literacy related to tax filing is an incredible benefit because it creates a healthier community and improves the daily lives of those in our community. Even highly educated persons may find the income tax instructions to be difficult to understand. This is especially true after major changes to the tax law, as occurred this year.

Program Structure

In the 2022 tax-filing season the Albany County EITC campaign will include the following:

1. A free tax preparation site at the Laramie Plains Civic Center that will be open to the general public 20-24 times during the tax season. Each session will last four hours. Six stations are set up to serve clients – meaning that six households can be served simultaneously. Sessions are held on Monday and Wednesday from 4-8 and Saturday from 9-1
2. University of Wyoming professor, Amber Mercil, from the Accounting Department will serve as the program director. Professor Mercil has experience teaching courses about accounting principles and taxes. Well-trained volunteers, most of whom are UW accounting students, staff the program. These volunteers are supervised by the program director and contributed approximately 1,200 hours of volunteer service to the program.
3. Posters and fliers will be placed in local establishments frequented by low-income taxpayers. Examples include local stores, laundry mats, and churches. Notices and advertisements will be placed in many of the local media outlets and radio. Fliers will be distributed at schools and community agencies.
4. This project is ongoing and aimed at taxpayers with household incomes of \$60,000 or less. In one session we can see 20- 50 households for help filing their tax return, meaning it assists a good portion of the community residents.

Partners

There will be three local partners in 2021: the United Way of Albany County, the UW Department of Accounting , and the Laramie Plains Civic Center. The United Way serves as the fiscal agent for the program and manages fundraising and public relations. The UW Accounting Department provides financial assistance and one of their professors oversees the operational side of the program. They provided \$1,000 in funds and volunteers; we expect this level of support to continue. The Laramie Plains Civic Center is providing space, set up, and assistance with public relations. Funding from

the City of Laramie and Albany County is used to leverage additional funds from other organizations that partner with the program. Other partners include:

1. **The Internal Revenue Service.** They provide free software, training materials, promotional materials, and technical assistance.

2. **Bank of the West and First Interstate Bank Foundation**– Together they provide \$5,000 -\$7,000 in funds in 2021-2022. We will request these grant in March of this year. Since these are not local grant, we are hopeful of receiving the same funding.

Funding Request –

In 2022, funds will be used for the following:

The total cost of running the program in 2023 will be \$13,000. This is an ongoing request. UWAC is requesting \$2,000 from the City of Laramie and \$4,000 from Albany County. The funding request is the same as last year. The United Way will seek the balance of the needed funds for the program through grants and donations from new or existing partners as outlined above. A breakdown of the budget for 2023 is included below:

1. \$6,500 – Staff/Administrative Costs: This item is the salary for the program’s staff, including the UW Accounting professor (who is not paid by the university) for the time spent at the tax site, United Way staff time including IT and Site Coordinator Intern costs. The program plans to pay University of Wyoming accounting students to serve as site coordinators and interns. They will assist the project directors in all aspects of the program. \$1,500 will be divided equally between the interns.

2. \$4,000 – Advertising: Marketing placement in local media outlets including newspaper and radio, social media and promotional materials including flyers and envelope stuffers.

4. \$500 – Equipment: This item is to purchase necessary equipment for the program that needs to be upgraded. This equipment mainly includes power cords, routers, and a new printer. This year, we purchased plexiglass screens, hand sanitizer, and other supplies.

5. \$1,500 – Office/Program Supplies: This item pays for office supplies to be used at the free tax preparation site, including printing paper, printer toner, envelopes, staplers, staples, pens, and incidentals. The biggest expense in this area is printer toner, as the program prints tax returns for every client.

6. \$500 – Training Costs: This item is for the purchase of training session supplies for prospective tax preparation volunteers including refreshments, volunteer packets, and display materials.

Section IV. *Financial Information* (a current balance sheet can be submitted to satisfy this requirement)

Balance Sheet as of December 31, 2021:

***See attached.**

SECTION V. *Fiscal Year Budget Information*

If your organization follows a different funding cycle (i.e. Calendar Year), indicate your budget cycle here:

The United Way of Albany County continues to run on a June – July fiscal year.

Revenue

	Amount	Secured or pending?
City of Laramie, Community Partner	\$2,000	Pending
Albany County, Community Partner	\$4,000	Pending
United Way	\$0	N/A
Donors	\$500	Secured
Fundraisers	\$0	N/A
Interest	\$0	N/A
Other - Grants	\$0	N/A
Other – Grants secured	\$6,500	Pending
Other – Dividends/Gains	\$0	N/A
Other – Misc.	\$0	N/A
Other – In Kind Rent	\$3,080	Secured
Total Estimated Revenue	\$16,080	

Expense

	Amount	Comments
Salary, UW Professor	\$2,500	
Salary, United Way	\$2,500	
Salary, IT	\$1,250	
Salary, Student Interns	\$1,500	
Rent – In kind	\$3,080	This is space provided by the Civic Center at no Cost to the program
Utilities	\$400	
Training Costs	\$500	
Marketing	\$4,000	
Equipment	\$500	
Other	\$0	
Other	\$0	
Total Estimated Expense	\$16,230	

Section VI: Interim Report for FY 2021/2022 Awardees Only

Complete this section if your agency was awarded Community Partner Funding in Fiscal Year 2021/2022

Amount Awarded? **\$1,528.00**

Have you used all of the funds awarded? Yes
 No

If you have not used all of the funds awarded, please include *amount remaining* and *date* by which you intend to use those funds. \$ _____
Date: _____

Briefly describe the impact that the FY 2019/2020 award has had on your program, project or organizational operations. Some discussion items to cover in this section may include:

- *Number of persons served and demographics of persons served (income level, age, race, etc.)*
- *Describe the overall impact of these funds on your program, project or organization*
- *If your agency has not yet to spent all of the awarded funds, please briefly describe your plans to expend the funds by the end of the fiscal year*
- *Did your agency use Community Partner funding to leverage additional funds, either through grants or other means?*

Number of persons served:

In 2021, the Albany County Vita Program served 412 households through its free income tax preparation program, bringing \$660,213 back to Albany County. This number is lower than previous years due to Covid restrictions requiring an appointment during sessions to file taxes. This was our only way to follow guideline set by the CDC and the University of Wyoming during the spring of 2021.

Demographics of the people served:

Approximately 8% of the people we served in 2021 were students at the University of Wyoming or LCCC. More than 50% filed a return using the single filing status. 99% of our patrons had a household income of \$60,000 or less. We served people of all races, ages, and backgrounds.

FY 2022/2023 Goals:

Our goal for the 2022 tax season are to return to serving at least 700 Albany County households. Additionally, we expect to help our clients recover over \$850,000 in refunds while saving them \$125,000 or more in tax preparation fees. Additionally, we help dozens of other people with tax filing information.

This year, we continue to implement COVID-19 procedures to protect the staff, volunteers, and community member. Through an online scheduling program, community members can schedule a socially distanced appointment to file their taxes at no cost.

Describe the overall impact of these funds on your program, project or organization:

The VITA program is grateful for the ongoing support we receive from the City of Laramie and Albany County. Because the tax program is a self-sustaining project, without community support it would cease to function. Funding from the City of Laramie and Albany County allows the program to continue to grow and assist more residents in the community. Specifically, funding allows the program to be led by a trained tax preparation site coordinator, to provide a professional experience and hands-on learning environment for volunteers, to increase the number of clients served through successful advertising, and to sustain a needed and necessary community program. Without such funds for the program, there would be a noticeable void for free tax preparation assistance for community members who rely on the service.

Did your agency use Community Partner funding to leverage additional funds, either through grants or other means?

In the past, the VITA program was able to leverage additional funds through a grant from First Interstate Bank of Wyoming, Bank of the West and the UW College of Business. The funding also helped us gain our partnership with the UW Department of Accounting.

2022 Board of Directors United Way of Albany County

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United Way Albany County
Statement of Financial Position
As of December 31, 2021

	Dec 31, 21
ASSETS	
Current Assets	
Checking/Savings	
Blue FCU Business Account	5.00
Petty Cash	26.58
UWAC Operating	432,288.06
Total Checking/Savings	432,319.64
Other Current Assets	
ANB MM 2400004949-Grant Fund	13,971.43
Bond Fund (Fidelity)	44,509.59
CDs	
ANB CD 6400000223 6/25/22	34,434.82
Blue FCU CD ACCT #xx167 5/26/22	9,998.44
BofWest CD 055379226 1/3/22	30,000.00
FIB CD 900013056 5/15/2022	29,998.87
UniWyo CD 51703 2/21/22	30,000.00
WF CD 2255207108 1/6/22	10,013.58
WSBxxxxx1950 CD 10/05/23	36,765.92
Total CDs	181,211.63
Northwest Mutual(\$102,000 Face)	111,900.80
Total Other Current Assets	351,593.45
Total Current Assets	783,913.09
Fixed Assets	
Property and equipment	
Accum depreciation	-4,246.00
Property and equipment - Other	4,246.00
Total Property and equipment	0.00
Total Fixed Assets	0.00
Other Assets	
Current Value of Life Insurance	
AXA Equitable I(\$300,000 Face)	25,495.20
New York Life (\$400,000 Face)	153,737.53
Total Current Value of Life Insurance	179,232.73
FIB-ETCHEPARE TRUST ENDOWMENT	364,501.42
Key deposit	150.00
Total Other Assets	543,884.15
TOTAL ASSETS	1,327,797.24
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Credit Cards	
FIB MASTERCARD 1730	1,694.92
Total Credit Cards	1,694.92
Other Current Liabilities	
Accrued Vacation	3,797.00
Payroll Liabilities	1,991.07
Total Other Current Liabilities	5,788.07
Total Current Liabilities	7,482.99
Long Term Liabilities	
Deferred Revenue	
COVID Relief	3,492.10

United Way Albany County
Statement of Financial Position
As of December 31, 2021

	<u>Dec 31, 21</u>
Etchepare	300,000.00
Mullen Fire Fund Carry Over	11,803.08
Total Deferred Revenue	<u>315,295.18</u>
Total Long Term Liabilities	<u>315,295.18</u>
Total Liabilities	322,778.17
Equity	
Net Assets	875,062.14
Unrealized Gains/Losses	54,811.30
Net Income	75,145.63
Total Equity	<u>1,005,019.07</u>
TOTAL LIABILITIES & EQUITY	<u><u>1,327,797.24</u></u>