

Town of Plymouth

80 Main Street

Terryville, Connecticut 06786

Human Services Commission

Telephone: (860)585-4001

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Human Services Meeting Minutes

November 21, 2017

I. Call Meeting to Order: Chairwoman Sally Bain-Picard called the November 21, 2017, Human Services Commission Meeting to order at 7:00 p.m. in the Senior Lounge at Plymouth Town Hall.

Fire Exit Notifications:

Chairwoman Sally Bain-Picard noted the fire exits.

II. Attendance: Chairwoman Sally Bain-Picard, Commissioner Karen Saccu, Commissioner Helena Schwalm and Commissioner Fred Schwalm. Also in attendance were: Councilman John Pajeski, Angela Morris, Beth Barton and Juan Berrios from HRA.

Excused Absence: Commissioner Reverend Joel D. Kotila, Vice-Chairwoman Heidi Caron and Commissioner Tracy Dupont

III. Pledge of Allegiance:

Chairwoman Sally Bain-Picard led the group in the Pledge of Allegiance.

IV. Public Comments: None

V. Minutes October 17, 2017:

A motion was made by Commissioner Karen Saccu, seconded by Commissioner Helena Schwalm to approve the October 17, 2017 minutes with the correction of the date in the Minutes. This motion was approved unanimously.

VI. Human Services Report:

Angela Morris from HRA gave her report. Please see attached.

There are 114 applications for the Small Wonders program as of October 2017. They will not be accepting any more applications.

Angela did outreach to Eli Terry on October 26. She gave applications for energy assistance, SNAP renewals and information.

Energy Assistance – last day is May 1st.

Customers stated that the phone number on website is wrong. Needs to be corrected.

Medicare enrollment – people can call the office. Deadline is December 7th.

Renters rebate – there is a stand still until they can figure out how to distribute the money as it has gone back and forth between the State and municipalities.

VII. Old Business:

a. Senior Packets - Beth Barton from HRA discussed the form she can create – one page – for the welcome bag. Wants to make sure programs are not being duplicated – 211 lists everything.

b. Birthday Bags – There is no longer local girl scouts in the area. No more birthday bags will be available.

c. Dial-A-Ride - Chairwoman Bain-Picard is still waiting for an appointment with the Mayor to review Dial-A-Ride contract. The invoices need to be reviewed each month. Commissioner Saccu will be reviewing them. Chairwoman Bain-Picard will reach out to Dawn in A/P to get the invoices.

d. Small Wonders – 142 applicants. 2 came from the back pack program. Chairwoman Bain-Picard is working on getting the total. There will be a check presentation and picture from the sale of the fire department calendars. This will be scheduled in mid-December.

New Business:

a. Human Resource Agency – Juan Berrios from HRA discussed the Volunteer Income Tax Assistance program known as VITA. It is a free income tax preparation for families and individuals. The criteria income is \$54,000 and below. It will be offered to Plymouth residents – free of charge. They have been doing this program for 14 years. 5600 tax returns were done last year. It is being done at 13-14 sites across the State. HRA is the top VITA site in State of CT. All the volunteers have to become certified. The accuracy rate is 95%. HRA would provide all the equipment, laptop and printers – just need space. Tues and Thurs available for staff. They have been working with United Way for 4 years now. HRA could have standings days at town hall and then promotional days at Gosinski Park and Eli Terry to make sure everyone can be serviced.

The Commission would like to have this done. The Senior Lounge will be used. Need to notify Juan by mid-December. Helena will call Trish to let her know Mondays and Wednesdays 9:00 AM – 12:00 PM.

b. Budget & Year End Narratives – The Commission needs to set a budget. It is due Jan 10th along with a narrative back-up documentation. A preliminary budget was submitted October 26, 2017. Need to know how many lines for the human services. Per Public Works Director, Dial-A-Ride is now under human services. Health department is also under the human services – although not under our jurisdiction. Chairwoman Bain-Picard is working on getting an appointment with the Mayor as she is looking for guidance to create the Budget. Councilman Pajeski will reach out to Mayor.

IX. Chairwoman's Comments: Chairwoman Bain-Picard distributed the 2018 meeting dates. Chairwoman Bain-Picard called IGA to get the \$15.00 gift cards. They are checking to see who is authorized to do the charges. They will get back to her. Need 100 medium sized bags for the next meeting. Councilman Pajeski will call Dumouchel Paper. Commissioners Schwalm will pick up the pizza from Terryville Pizza. Chairwoman Bain-Picard requested account balances to be provided each month which includes deposits or checks paid out from the Comptroller.

X. Council Liaison's Comments: Councilman John Pajeski will call Dumouchel Paper to see if he can get 100 medium size bags. He will also reach out to Mayor Merchant to schedule the meeting with Chairwoman Bain-Picard.

XI. Next Meeting: Tuesday, December 12, 2017 @ 5:30 PM

XII. Adjournment:

There being no further business of the Human Services Commission, a motion was made by Commissioner Karen Saccu, seconded by Commissioner Helena Schwalm to adjourn. This motion was approved unanimously. The meeting ended at 8:30 p.m.

Respectfully submitted,


Linda Schnaars
Recording Secretary



Human Resources Agency of New Britain, Inc.
Community Services Department

Plymouth Human Services Monthly Report

October 2017

Submitted by: Angela Morris

Reporting Period: October 1, 2017 – October 31, 2017

Services	Total Count
Phone Calls	170
Walk-ins	22
Appointments	48
Senior Housing Outreach	1
Rental Assistance	1
Commodity Supplemental Food program (CSFP)	9
Medicare Savings Program	2
SNAP Applications/Renewals	7
Energy Assistance Applications	26
Small Wonders Holiday Applications	92

Outreach to Senior Housing: On October 26th, outreach was done for Eli Terry senior housing to provide assistance with energy applications and other services requested by the residents. During the visit, I was able to complete six energy assistance applications and two SNAP Renewals.

Energy Assistance: Energy Assistance began on August 1st and the last day to submit an application is May 1st. All those interested in applying may do so by calling the Human Services office to schedule an appointment.



Human Resources Agency of New Britain, Inc.
Community Services Department

Plymouth Human Services Monthly Report

Commodity Supplemental Food Program (CSFP): There are now 9 people signed up for the Commodity program and are receiving their monthly food boxes. This is ongoing and applications are available year round for any seniors interested in applying. The boxes are delivered to the Town Hall on the third Wednesday of each month. We encourage more residents to come in and apply.

Food Boxes: Food Boxes are available at the Human Services office for those in need of emergency food. This is provided on an as needed first come first serve basis. There are also food boxes available at the senior housing for those who are in need and have no way of getting any food. This will also be on an as needed first come first serve basis.

Small Wonders Holiday Program: To date, there are a total of 92 applications submitted for the holiday program. The deadline to submit the applications is November 10th. After the November 10th deadline, there will be no further extensions or additions.

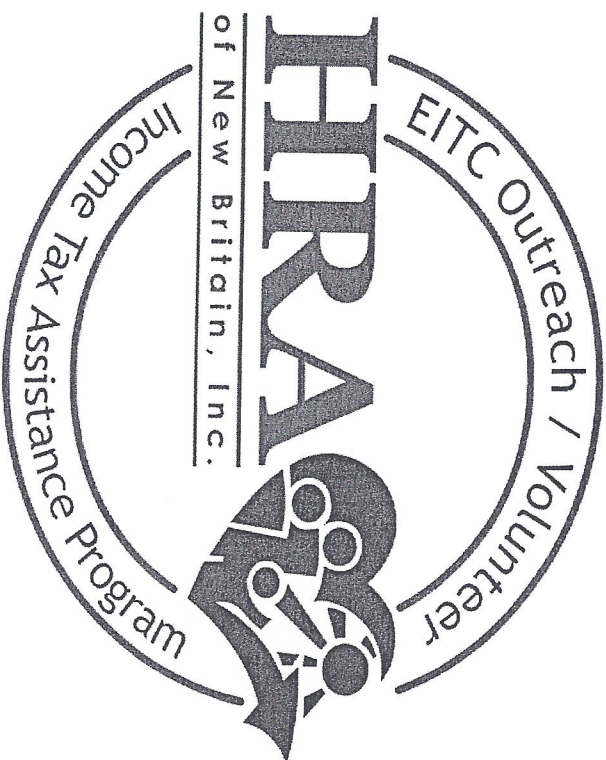
Medicare Enrollment: Medicare enrollment is also available at the Human Services office. If there are any seniors that would like to enroll, please call to schedule an appointment to do so.

HRA & Central Connecticut VITA Historical Performance Data

Human Resources Agency of New Britain, Inc. (HRA) has led the New Britain Asset Building Coalition and has successfully operated the Volunteer Income Tax Assistance program in New Britain since 2004, consistently increasing the accessibility and quality of the services. During the 2016 Tax Season, HRA maintained its operations in the Bristol, Farmington, Meriden, New Haven, Southington, Vernon and Wallingford. Over the years we have filed a total of 35,801 federal returns resulting in a total of \$58,312,023* in Federal refund dollars alone. Nearly 38% (\$22,026,704*) of these federal dollars have been from Earned Income Credit claimed over the ten year period (see comparison of recent years below). This is in keeping with the original goal of the NB Asset Building Coalition to expand EITC Outreach and education, increasing the number of families claiming the Earned Income Credit. The total estimated savings in tax preparation costs to our customers for the 2017 year based on a basic service fee of \$152 per return was over \$855,605.

Program Year Filing Tax Year	2004 TY 2003	2012 TY 2011	2013 TY2012	2014 TY 2013	2015 TY 2014	2016 TY 2015	2017 TY 2016
Clients Served	482	2409	2571	4399	5015	5484	5629
Total Amount in Refunds	\$613,685	\$4,633,731	\$4,882,375	\$7,373,554	\$8,122,198	\$9,053,608	\$8,908,361
Total and % of Earned Income Tax Credit	\$203,865 33%	\$1,410,086 36%	\$1,872,424 37%	\$2,718,701 37%	\$3,026,602 32%	\$3,390,835 35%	\$3,474,747 40%

Site Name	Total Returns	EIC Dollars	Refund Dollars	AVG AGI
Arch St	1248	\$900,354	\$2,176,662	\$21,507
Oak St	2102	\$1,427,127	\$3,525,028	\$24,786
Scarlett Dr.	157	\$135,961	\$292,915	\$21,009
VITA Mobile	414	\$214,028	\$510,677	\$21,822
Bristol UW	492	\$255,408	\$678,470	\$20,804
NBHS	117	\$95,863	\$270,716	\$27,359
Meriden Library	1099	\$446,006	\$1,453,893	\$29,518
Grand Totals	5629	\$3,474,747	\$8,908,361	\$23,829



2017 Tax Season Report

Dr. Catherine R. Baratta, Board President

Rocco R. Tricarico, J.D., Executive Director



EITC Outreach, Volunteer recruitment and training were conducted during the Fall of 2016 to prepare for the season. Thousands of flyers, pamphlets, and postcards were distributed to advertise the services and attract volunteers. As a result, we had great success in securing **192** committed volunteers to serve **5,629** customers within our target population of people with earned income of less than \$54,000. Our Foundations For Financial Independence Program for youth supported participants in achieving their continuing education goals with the help of our partners. This report was prepared by our team to highlight everyone's accomplishments! Enjoy!

Who we served...

- **5,629** residents of **New Britain, Meriden, Bristol** and surrounding towns.
- **Hispanic** (48.2%), **African American** (18.0%), **Caucasian** (23.5%), **Native American** (0.2%), **Asian/Pacific Islander** (3.0%) and **Other** (7.1%).
- **85.4%** of customers had obtained a **High School diploma/GED or better**.
- **337 (6.46%)** filed for an **Education Credit**.
- **Taxpayer ages:** Under 18 to 24 (**23.02%**), 25 to 40 (**47.60%**), 50 to 80 (**29.62%**), 80+ (**0.54%**)
- **4,602 (88.86%)** had **Full Year Health Care Coverage**
- **3,347 (65.00%)** requested **Direct Deposit** on their returns.

Customer survey results...

- **81.51%** rated the services overall as **EXCELLENT** and **17.99%** as **GOOD**
 - **79.53%** felt the program's ability to meet their needs was **EXCELLENT** and **19.77%** as **GOOD**
 - Overall **less than 1%** indicated that the services need improvement
 - **14.2%** of customers were **first time filers** or **did not file** last year
- Most requested addtl. service needs**
HRA customers requested expressed a need for additional services in the following areas listed by priority:
1. **Affordable Housing (54%)**
 2. **Energy Assistance (23%)**
 3. **Free Tax Preparation (23%)**
 4. **Budgeting (18.%)**
 5. **Saving for/Buying a Home (15%)**

VITA Mobile Sites

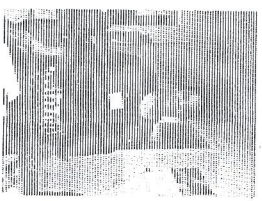
In prior seasons HRA had consolidated their smaller sub-offices into one mobile operations unit. This mobile unit would operate in different cities and towns in the State of Connecticut. This year the Mobile site began new partnerships with **Tunxis Community College** and the **Wallingford Public Library**. The Mobile VITA operation also continued operations at the **South Central American Job Centers** in Meriden and New Haven as well as the **Southington Community Services**, the **Town of Vernon's Community Services Department**, and the **Spanish Community of Wallingford**.

For the 2016 tax season, **VITA Mobile** did a total of **414** returns exceeding the HRA's goal of **300** returns. The total Earned Income Credit for **VITA Mobile 2016** was **\$214,028**; the average AGI was **\$21,822** and the total refund amount was **\$510,677**.

- **American Job Center - Meriden:** 27 returns, average AGI at \$19,533, a total EIC of \$17,868 and a total refund amount of \$44,659.
- **American Job Center - New Haven:** 78 returns, average AGI at \$20,291 a total EIC of \$24,763 and a total refund amount of \$86,075; Increase of 44.44% from TY2015.
- **Vernon Social Services:** 77 returns, average AGI at \$16,351, a total EIC of \$52,565 and a total refund amount of \$110,464; Increase of 54.00% from TY2015.
- **Southington Community Services:** 39 returns, average AGI at \$22,964, a total EIC of \$6,142 and a total refund amount of \$27,788; Increase of 54.00% from TY2015.
- **Spanish Community of Wallingford:** 30 returns, average AGI of \$17,872, a total EIC of \$10,269 and a total refund amount of \$33,133; Increase of 57.89% from TY2015.
- **Tunxis Community College:** 60 returns, average AGI of \$22,636, a total EIC of \$19,059 and a total refund amount of \$65,846.
- **Wallingford Public Library:** 75 returns, average AGI of \$24,550, a total EIC of \$23,069 and a total refund amount of \$74,755.
- **Mobile Returns:** 29 returns, average AGI of \$23,405, a total EIC of \$29,094 and a total refund amount of \$74,755.

2016-2017 VITA Team:

- Marlo Grepone - Program Director**
- Luan Berrios - Program Manager, NBHS & Arch Street Site Coordinator**
- Dionette Martinez - Southington Region and North Oak Site Coordinator**
- David McGhee - Assets Management Coordinator**
- Tamozs Kandybowicz - VITA Mobile & United Way Bristol Site Coordinator**
- Roxanne Rainford - FI Career Specialist**
- Katie O'Donnell - Scarlett Drive Site Coordinator**
- Maria "Mike" Aleksandrowicz - Oak Street Site Coordinator**
- Orno-Oise Iweoise - Arch Street Site Coordinator**
- Johnny Soto and Noah Grimaldi-Meza - Greeters**
- Kenneth Beaudry - Meriden Public Library Volunteer Site Coordinator**



NIB Asset Building Coalition Building A Foundation For Family and Economic Stability

Arch Street Neighborhood Center

The Arch Street Neighborhood Services Center completed another successful tax season ending on April 18th. The site is home to the HRA Energy Assistance Program, HSI and SSBG Case Management Programs, and the central call center for the VITA Program. In addition, the site is a home for the VITA Youth Program with Youth Volunteers primarily volunteering on site on Wednesdays and Saturdays. This season the site had an internal goal to break 1,000 returns and become the 2nd largest VITA Grant Site in Connecticut.

This season, the site completed 1,248 returns posing an increase of 17.74% from last year's final number of 1,060. The average refund amount for the site was \$1,888, total refund amount was \$2,176,662. Out of the refund total \$900,354 was from the Earned Income Tax Credit. For the 2016 Tax Season, Arch Street was able to meet the internal goal and become the second largest VITA Grant site in the State of Connecticut!

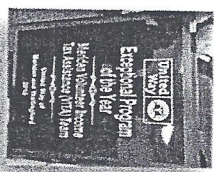
Meriden Public Library

The Meriden Public Library (MPL) site has been the largest VITA site in the Meriden region for over 30 years. The library began its partnership with HRA during the 2013 Tax Season through a collaboration between the Library, the United Way of Meriden and Wallingford and the Internal Revenue Service. The Library has 16 very dedicated veteran VITA Volunteers, most of whom have volunteered for close to or over ten years!



The MPL is a 100% volunteer run site led by Kenneth Beaudry with support from local partners and HRA.

During the 2016 Tax Season the Library completed 1,099 tax returns for the season and came in as the 4th largest VITA Grant Site in the State of Connecticut.



NIB Asset Building Coalition Building A Foundation For Family and Economic Stability

IRS Community Service Leadership Awards

Since Tax Season 2013, Site Coordinator's have nominated VITA Volunteers who go above and beyond the scope of their volunteer duties the IRS Community Service Leadership Award. This season, the Site Coordinators of Oak, Arch, Bristol and Meriden have nominated the following volunteers who will receive the Community Service Leadership Award.

Maureen Frazier - Tunxis Community College
Mary Beth Frederick - North Oak Community Center
Bryant Mercado - Arch Street Neighborhood Center, NBHS Academy of Finance
Samantha Music - Wallingford Public Library, Arch Street Neighborhood Center
David Radl, CPA - United Way of Bristol VITA
Maria Del Carmen Razo - Arch Street Neighborhood Center
Richard Towne - Meriden Public Library
Jaminah Walker - NBHS Academy of Finance
Sylvia Yanez-Solis - United Way of Bristol VITA

North Oak Community Center

The HRA North Oak Community Center is located on 35 Oak Street in New Britain and has been in operation as a VITA site since 2005. Oak Street began its 12th VITA Season on January 17th, 2017 and operated on Tuesdays, Wednesdays and Thursdays from 3:00pm-8:00pm and on Saturday's from 9:00am-3:00pm. Over the last eight years Oak Street has grown to be the largest VITA site in the State of Connecticut preparing over 2,000 returns annually. In the current season, Oak Street was the only VITA site to break 2,000 returns across the state and is the largest VITA Grant Site in Connecticut.

For the 2016 season, Oak Street was open to the general public who had appointments. Walk-ins were also accepted on a limited basis. Customers were greeted by a New Britain High School Academy of Finance Intern, Johnny Soto. Johnny's duties as the site's greeter included helping customers who needed assistance in completing the necessary intake forms and maintaining the flow of the site.

This season, 2,102 income tax returns were completed on Oak Street with customers receiving an average refund of \$1,815. The total refunds on Oak Street were \$3,525,028; \$1,427,127 of those dollars came from EITC and \$743,414 from other credits such as the Child Tax Credit.

This season Oak Street saw an increase in Form 1095-A under the Affordable Care Act (ACA). There was an increase in customers who either owed or had their refund lowered due to the Advanced Premium Tax Credit (APTC). In addition to this, there was also an increase in rejected returns due to a lack of an IRS Identity Protection Pin (IP PIN) which resulted in several delays. Overall, the Oak Street site had a great season with a great team of dedicated volunteers!

NB Asset Building Coalition Building A Foundation For Family and Economic Stability

United Way of West Central CT - Bristol VITA

The United Way of Bristol VITA site operated two days a week, every Tuesday from 4pm to 8pm and Saturdays from 10am to 2pm. During the 2016 tax season the Bristol site saw an increase in the total number of volunteers to about 16 volunteers who were evenly split between the two days.

For the 2016 Tax Season, the United Way of Bristol site completed 492 returns. The total refunds brought back to the greater Bristol community was \$678,470 with the average refund being \$1,425.



The site also obtained some newer volunteers through HRA's partnership with Tunxis Community College.

In January of 2017, HRA also merged with the Bristol Community Organization (BCO) becoming the Community Action Agency for the Bristol Service Area which includes Bristol, Burlington Farmington, Plainville, and Plymouth

Youth Services Center on 58 Scarlett Drive

The Scarlett Drive VITA site was scheduled to open on Mondays from 3:00-6:00 beginning January 25 during this year's tax season.

Scarlett Drive prepared a total of 157 returns this season. The average Earned Income Credit at Scarlett was \$894 representing an additional \$135,961 in EIC dollars to the taxpayers. The average refund amount was \$1,927 totaling \$292,915 in refunds returned to the taxpayers.

Scarlett Drive benefits from the bilingual skills of the Youth Services staff that is pressed into service when a taxpayer speaks Spanish, particularly Marilyn Ramos, and by the flexibility of the director, Leticia Mangual in allowing her staff to take frequent walk in appointments. The addition of a second site coordinator, Dianette Martinez, enabled Scarlett to handle more complex returns. Thanks to all of them for a successful season.

Foundations for Financial Independence (FFI) - Connecting VITA to Financial Stability

Each tax season HRA makes an effort to link VITA to other Financial Stability related programming. During the 2016 tax season, taxpayers had the opportunity to connect to a few programs to help their money grow.

A number of tax clients struggling with credit card debt, student loan debt, and tax garnishments sought to address their financial issues sooner rather than later. During this tax season we had an increase in tax clients reach out for additional financial services assistance on the same day of filing their 2016 tax returns or shortly thereafter. This is significant since more clients seem to be tending to their *Financial Health* during the tax season rather than wait for some uncertain future date. Typically, financial concerns are uncovered while taxes are being prepared, and typically the tax client procrastinates in addressing those concerns. However, this year we saw more people reach out to HRA for help during the tax season rather than put their financial health issues on hold. We welcome this change in behavior since we have a focus on integrating VITA clients with HRA's other Foundation for Financial Independence Programs, i.e. Financial Education, Financial Coaching, Budget Coaching, and Career Counseling. We hope the trend continues. Our VITA clients are *Financially Healthy*!

VITA Youth Program and The Academy of Finance

For the 2016 Tax Season, the VITA Youth Program recruited over 54 students from the New Britain High School Academy of Finance, NBHS Satellite Careers Academy, Lyman Hall High School, Orville H. Platt High School and Francis T. Maloney High School. The students were recruited from several Business related courses such as Accounting, Principles of Finance and Entrepreneurship. HRA and the VITA Youth Program also saw three returning youth who've now graduated and provided one NBHS AOF students with an internship to act as a Greeter during the filing season.



The VITA site at NBHS this season completed a total of 117 returns and the youth prepared close to 300 returns over 1,100 volunteer hours. The program involves the New Britain High School Academy of Finance which Mario Grepone and Juan Berrios are officers in the Advisory Board. The Academy's Advisory Board fully supports the endeavors of all of the students who participate in the program. The HRA VITA Youth Program is the only one of its kind in the State and plans are in place to expand into Berlin and Newington Schools.

Rookie of the Year

The Rookie of the Year award is given to New Volunteers who have not only gone above and beyond the scope of their volunteer duties in the program but has shown tremendous growth and progression throughout their first year experience.

Sonika Agrawal - North Oak Community Center
Roger Ouelllette - Arch Street Neighborhood Center