
MANAGEMENT REPORT

Date: June 13, 2023
To: Social Services Sub-committee
From: Colleen Steckly, Administrative Assistant to the Director of Social Services
Kim McElroy, Director of Social Services
Report #: SOC23-018
Attachments: None

Title: Annual Community Income Tax Clinic for Completion of 2022 returns

Objective: To provide Council with a report on the annual community income tax clinic serving low-income residents of the City of Stratford, Town of St. Marys, and County of Perth.

Background: The City of Stratford has coordinated an annual income tax clinic for low-income residents since 1989, with the support of local accounting firms. Services continued to be provided this year free of charge by two local accounting firms, Famme & Co. Professional Corporation, and McCutchen & Pearce Professional Corporation. Together they provided the opportunity for 132 participants to have returns completed.

Analysis: Prior to the pandemic, appointment slots were scheduled for in-person attendances with the accountants at various locations in Stratford on one day in mid-March. Throughout the pandemic, the City of Stratford Social Services Department was tasked with coordinating these services without interruption to residents by moving to a drop off/pick up approach rather than in-person with the accountants. This year, after consultation with the accounting firms involved, this method continued as we are able to serve more participants and more time is allowed to the agencies preparing the documentation free of charge. We communicated well in advance of the clinic, providing details to partner agencies, posting to various media platforms, displaying details on screens on the city transit buses, and included insert reminders with February benefits payment stubs to Ontario Works clients. Caseworkers, reception, and intake staff were informed of the details to share with clients.

This year, when contacted, one of the accounting agencies indicated they were no longer able to participate. We are grateful to BDO Canada LLP for their past participation. We had the same commitment of appointment times available as the previous year from Famme & Co. Professional Corporation and McCutchen & Pearce

Professional Corporation for completion of the 2022 tax returns. The program is offered on a first come first served basis with every effort made to accommodate as many participants as possible. There were 132 spaces available, with 126 spaces utilized by the deadline.

This year eligible annual incomes changed slightly to \$27,589 or less for individual and \$34,346 or less for couples. This brought the eligibility in line with the low-income cut off (LICO) scale and current guidelines for the Housing Stability Bank, the program formerly known as CHPI (Community Homelessness Prevention Initiative). This allows the service to be provided to individuals who may not otherwise be able to afford to file taxes through private corporations or accountants. Postage paid envelopes with proper mailing address for Canada Revenue Agency (CRA) were provided by firms if e-file was not an option. Only current year returns are completed during the clinic. As an alternative, referrals were made to another program offered through The Salvation Army under Purchase of Service Agreements with the City for anyone unable to meet our submission deadline, or if they had multiple years of returns or estate returns to be completed. The Salvation Army offers sites in St. Marys and Listowel which enables participants without the means to travel to Stratford to still participate in this very worthwhile opportunity.

Since its inception, this well-received program has been beneficial to residents of Stratford, St. Marys, and Perth County. It provides an essential service that helps residents access further resources and ensure they are receiving all federal benefits available to them to maximize incomes. It has been helpful for individuals requiring income tax returns for applications such as Rent-Geared-to-Income Housing or the Canada Child Benefit and fosters greater financial stability when they receive federal benefits such as GST/HST credit.

This year we engaged with refugee claimants, and residents experiencing homelessness through community supports to make every effort to enable maximum access to all resources available. The flexibility and cooperation received from the accounting firm contacts and partners was key to keeping the process moving along.

Financial Implications:

Financial impact to current year operating budget:

All professional accounting services are provided free of charge to participants. The cost to the Corporation was administrative time, which did not have an impact to this year's budget or to service delivery.

Financial impact on future year operating budget:

There would be no future year impact.

Alignment with Strategic Priorities:

Strengthening our Plans, Strategies and Partnerships

Partnering with the community to make plans for our collective priorities in arts, culture, heritage and more. Communicating clearly with the public around our plans and activities.

Alignment with One Planet Principles:

Health and Happiness

Encouraging active, social, meaningful lives to promote good health and wellbeing.

Equity and Local Economy

Creating safe, equitable places to live and work which support local prosperity and international fair trade.

Culture and Community

Nurturing local identity and heritage, empowering communities, and promoting a culture of sustainable living.

Staff Recommendation: THAT the report titled, "Annual Community Income Tax Clinic for Completion of 2022 Returns" (SOC23-018), be received for information;

AND THAT Social Services issue a thank you on behalf of the City of Stratford, to all businesses that offered and provided their support and services.

Prepared by: Colleen Steckly, Administrative Assistant to
Director of Social Services

Recommended by: Kim McElroy, Director of Social Services
Joan Thomson, Chief Administrative Officer