

MANAGEMENT REPORT

Date: September 10, 2024
To: Social Services Sub-committee
From: Colleen Steckly, Administrative Assistant to the Director of Social Services and Kim McElroy, Director of Social Services
Report Number: SOC24-009
Attachments: None

Title: Annual Community Income Tax Clinic for Completion of 2023 Returns

Objective: To provide Council with an update 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 124 participants to have returns completed.

Analysis: Pre-pandemic, appointments were scheduled for in-person attendances with the accountants at various locations in Stratford on one day mid-March. Throughout the pandemic, the City of Stratford Social Services Department coordinated these services without interruption to residents by moving to a drop off/pick up approach and after consultation with the accounting firms involved, this method continues. We can serve more participants and allow more time to the agencies preparing the returns free of charge. We communicated well in advance of the clinic, providing details to partner agencies, posting to various media platforms, including displaying details on screens on the city transit buses, as well as reminders to Ontario Works clients. Caseworkers, reception, and intake staff were informed of the details to share with clients.

We had the same commitment as previous years of 132 appointment times from Famme & Co. Professional Corporation and McCutchen & Pearce Professional Corporation for completion of the 2023 tax returns. The program is offered on a first come first served basis with every effort made to accommodate as many participants as possible. Initially the 132 spaces were booked completely but there were several

cancellations, so every attempt was made to backfill the remaining spots. By the end of the clinic 124 returns were completed.

This year participation was open to any participant on Social Assistance (Ontario Works, ODSP) with a Form T5007, Seniors 65+ with single income of \$25,396 or less and couple income of \$34,346 or less. Finally, all other participants with a single income of \$16,000 or less and couple income of \$32,000 or less. 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. Only current year returns are completed during the clinic. As an alternative, referrals were made to a 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 receiving federal benefits such as GST/HST credit.

All professional accounting services are provided free of charge to participants.

Financial Implications:

Financial impact to current year operating budget:

There is no cost to the Corporation other than some administrative staff time to coordinate with the accounting firms and schedule appointments, which did not have an impact on this year's budget or to service delivery.

Financial impact on future year operating budget:

There would be no future year impact relating to the 2023 clinic.

Alignment with Strategic Priorities:

Work Together For Greater Impact

This report highlights the coordination of a program that supports residents accessing further resources, so they receive all federal benefits available to them to maximize incomes.

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 City of Stratford issue a thank you to all businesses that provided their support and services during the Annual Community Income Tax Clinic.

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

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