



Community Action Solutions

January - February 2006

Tax return preparation assistance program kicks into high gear

Only a month into the tax filing season, community action agencies are reporting floods of residents seeking free assistance completing and electronically filing their federal and state tax returns.

The tax return preparation service is part of the Oklahoma Asset Development Project that is being coordinated by the Oklahoma Association of Community Action Agencies .

The project is now in its second year. Member agencies joined forces with the Internal Revenue Service and the Oklahoma Department of Commerce to help low and moderate income residents file their returns, increase their financial literacy and begin developing assets.

Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties

“Busy - very, very busy,” is how a Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties official described its five tax preparation assistance sites.

Publicizing the service with banners and through neighborhood newsletters has brought a steady stream of residents in for assistance, according to Christina Vass, administrative assistant and coordinator of the Results Oriented Management and Accountability program.



Carla Noftzger, community specialist for Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties, prepares a tax return.

Sites have been established in two of the agency’s district offices plus Redlands Community College in El Reno, 1st Commercial Bank and Oklahoma City Community College.

Community Action Resource & Development

“It’s been going great,” said Amanda Wickham, tax coordinator at Community Action Resource & Development which is based in Claremore. The agency has already completed about 600 returns -- nearly three times the total number completed in 2005.

Wickham credited RCB Bank with helping promote the service through staffers in customer bank statements and billboard advertising. Bank staffers have also lent a hand completing

returns.

Northeast Oklahoma Community Action Agency

“We’re very busy,” said Jean Cooper, executive director, Northeast Oklahoma Community Action Agency which is headquartered in Jay.

The agency recruited two dozen volunteers and expanded its marketing efforts.

The agency took its computer to Lowes to complete returns for store employees.

“We want to do 500 returns

and \$1 million in refunds,” Cooper added.

The agency has also been distributing flyers on financial education.

“A number of clients expressed interest in financial education classes,” Cooper said. However, those classes will have to wait until after the tax filing season.

Washita Valley

Community Action Council

Sharlotte Key, executive director, Washita Valley Community Action Council in Chickasha, reported agency staff and volunteers have completed about 375 returns - exceeding their 350 return goal for the year.

The agency is taking appointments for assistance in its Chickasha office and Anadarko Head Start center.

Tax return preparation

Continued from page 1

Central Oklahoma

Community Action Agency

Central Oklahoma Community Action Agency is collaborating with the University of Oklahoma and Oklahoma Baptist University.

Patty Heer, director of Retired and Senior Volunteer Program (RSVP) in Shawnee, and Carla Fry, RSVP director in Norman, manage the program.

The Oklahoma Department of Human Services is referring clients to the program.

“They’re getting the word out for us.”

Big Five Community Services

Big Five Community Services is getting help from Southeastern Oklahoma State University accounting students.

Beth Parker, administrative programs coordinator at Big Five, reported during one three-hour period 70 people came in for tax preparation assistance in Durant.

Big Five is providing assistance in Durant, Ardmore, Coalgate, Marietta and Ada.

INCA Community Services

INCA Community Services is getting help from Murray State College. Five students and their professor are working on the project.

Rena Payne, community specialist for the Tishomingo based agency, hopes to at least double the number of returns completed during the first year of the program.

Delta Community Action Foundation

Delta Community Action Foundation’s Becky Deaton had set a goal to complete 150 returns this year -- double last year’s total for the agency headquartered in Lindsay.

She reported about 50 had already been complete and another 200 were scheduled at the Southern Oklahoma Resource Center.

Deep Fork

Community Action Foundation

“We’ve already done 115. It’s incredible. I can’t believe it,” declared Sherry West, social services director, Deep Fork Community Action Agency in Okmulgee. She’s been taking about 10 clients a day.

People who came in last year are coming back this year bringing their friends, she said.

Little Dixie Community Action Agency

Little Dixie Community Action Agency is providing help in each of its family service centers and the Head Start center, Wendi Kuhl, assistant housing director, reported.

With over 100 returns completed in the first month, the agency is on its way to topping last year’s total of 189 returns.

The Hugo based agency is also offering credit counseling and information on other programs to clients.

Community Action

Development Corporation

Debbie Stinnett, human resources director, Community Action Development Corporation in Frederick, is hoping to complete 400 returns in the agency’s seven county service area.

Cookson Hills

Community Action Foundation

Cookson Hills Community Action Foundation in Tahlequah has a bilingual staff member assisting Hispanic clients obtain a required federal taxpayer identification number and complete returns, according to Lisa Williams, executive secretary.

KI BOIS Community

Action Foundation

Christy Fite, volunteer income tax assistance coordinator, reported KI BOIS Community Action Foundation staffers completed 250 returns in the first month -- about 40 percent of the

agency’s 600 return goal. The agency, which is based in Stigler, is offering tax preparation assistance at nine sites.

Opportunities, Inc.

Opportunities, Inc. staffers in Woodward and Guymon have really been busy preparing returns, Georgia Forthum, executive director, reported. The agency is also preparing returns in Alva, Beaver, Clinton and Watonga.

“We’re working hard to cover all bases,” Forthum said.

Southwest Oklahoma

Community Action Group

Head Start centers in Southwest Oklahoma Community Action Group’s service area are scheduling appointments, explained Virginia Goskey, RSVP director.

Many of the clients have learned about the service by word-of-mouth although the agency has been publicizing the program with posters and newspaper articles.

Three volunteers are preparing the returns for the Altus based agency.

Community Development

Support Association

“It’s been awesome,” exclaimed Carolyn Pickard who is overseeing the program for Community Development Support Association in Enid.

With a site in the Enid Community Learning Center and a laptop to take out into the community, eight volunteers and staff members have already completed about 170 returns -- exceeding a goal for the year of 100.

Two large area employers put a flyer about the program in their payroll envelopes. Flyers were also distributed to area businesses and organizations.

Great Plains Improvement Foundation

Commanche county based Great Plains Improvement Foundation is providing services two evenings each week and on Saturdays.

Weatherization: Long-term solution to high utility bills

The Weatherization Assistance Program is a federally funded effort to help low-income individuals save energy and make better use of limited income by making energy related improvements to their home.

Garcia Tarver oversees the program at the Oklahoma Department of Commerce. He answered a series of questions about the program.

What is the Oklahoma Department of Commerce's role in the program?

The Oklahoma Department of Commerce/Office of Community Development (ODOC/OCD) receives and distributes the funds, plans and implements the program, manages the program and contracts with the community action agencies, monitors for state and federal compliance and inspects the project on-site.

How is the program funded?

The Weatherization Assistance Program is primarily funded by the U.S. Department of Energy (DOE) on an annual basis. Additionally, a portion of the Low-Income Housing Energy Assistance Program (LIHEAP) funds funded through the U.S. Department of Health and Human Services through the Oklahoma Department of Human Services (DHS) is contracted to ODOC/OCD for weatherization assistance.

The funds are distributed by an established formula to 19 community action agencies that serve all 77 Oklahoma counties. The community action agencies qualify individuals and provide the services.

Private donations are received through the Energy Conservation Assistance Fund (ECAAF). The funds are distributed

through individual applications from community action agencies.

How much in federal dollars came to Oklahoma for the program last year?

Oklahoma received approximately \$2.6 million from DOE, approximately \$1 million from DHS, and approximately \$12,000 from the ECAAF.

How many houses were weatherized during the past year?

Approximately 1,371 (917 DOE, 450 DHS, and 4 ECAAF)

The Oklahoma Energy Resources Board recently donated \$1 million to the program. How will that impact the program?

The donation from OERB will expand the number of persons receiving weatherization assistance, and in some cases expand the repairs and energy savings. The donation will allow local agencies to address the clients on waiting lists due to limited funds and conditions at the home that heretofore prohibited assistance.

Are there particular groups that the program targets?

Priority is given to the elderly, handicapped, families with children, families that are energy burdened (spend a large portion of their income for energy), and high energy users.



Garcia Tarver oversees the Weatherization Assistance Program at the Oklahoma Department of Commerce.

What are the requirements for a resident to receive weatherization services?

Households with incomes below 60% of State Median Income are eligible for the program. For example:

- Family size 1 — \$16,030
- Family size 2 — \$20,962
- Family size 4 — \$25,894

In addition, households that receive certain payments for social security, disability, and other programs are eligible. Individuals must make application with the community action agency for a specific eligibility determination.

See 'Weatherization' on page 4

Weatherization

Continued from page 3

Are there additional requirements if the resident lives in a rental house?

Are multi-family housing units eligible for weatherization services?

Rental units are eligible with the following provisions:

- Community action agencies must obtain written permission from the owner.
- Not less than 66 percent (50 percent for duplexes and four-unit buildings) of the dwelling units in the building are occupied by eligible households.
- The benefits of weatherization assistance (lower energy expenses) will accrue primarily to the low-income tenants, and
- Other restrictions regarding resident rights, excessive enhancement, owner participation, and resolution of disputes.



*Weatherization
Works*

What is involved in the energy audit?

Oklahoma requires the use of the Department of Energy National Energy Audit Tool (NEAT). Community action staff input information regarding the dimensions, energy cost, materials costs, labor costs, conditions, air flow, heating system into the audit software. The audit in turn produces an output report that lists the most cost effective energy related repairs necessary.

What information is required from the resident applying for weatherization assistance?

To apply for the program the applicant must provide source/proof of income or benefit payment, and in some cases proof of home ownership.

What specific energy saving measures can be performed on a house?

Infiltration: Reduction of unnecessary air flow through the house. Accomplished through caulking, weather stripping, repair or replacement of windows, repair or replacement of doors, and limited structural repairs as detected through the blower door diagnostics.

Insulation: Increasing the thermal efficiency of ceiling, walls, and on a limited basis floors through the installation of loose fill or batt insulation.

Health and Safety: Repair or replacement of inefficient combustible fuel appliances that produce toxins in the indoor air.

How long does it typically take to weatherize a house?

Depending on the availability of materials the actual weatherization process can be accomplished in 1-2 days.

How much is typically spent to weatherize a house?

The average allowable cost is \$2,744 per unit, which includes labor and materials. The average in Oklahoma is closer to \$2,200 per unit.



Window replacement is sometimes required to stop air infiltration into a home.

Statewide RX for Oklahoma to provide prescription assistance

A statewide prescription assistance service has been established to help eligible uninsured and underinsured Oklahomans obtain medicine through prescription assistance programs provided by pharmaceutical manufacturing companies.

The Oklahoma Department of Commerce (ODOC) announced the launch of RX for Oklahoma during an open house in Norman.



Kathy McLaughlin, director of programs at the Oklahoma Department of Commerce, chats with James E. Sconzo, executive director of the Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties. A \$1 million state appropriations to ODOC is providing funding for the program.



Greg Lewis describes the technology used to access information about the various prescription assistance programs offered by pharmaceutical manufacturing companies. Information is obtained through a high speed internet connection and is stored on a central server with access to sensitive information password protected.

On hand for the event were State Rep. Kris Steele (R-Shawnee) and State Sen. Susan Paddack (D-Ada), who were principal authors of the bill to fund the program, and Rep. Thad Balkman (R-Norman), in whose district the office is located.

ODOC awarded Central Oklahoma Community Action Agency (COCAA) the contract to provide the services.

COCAA is subcontracting with Oklahoma's community action agencies and area agencies on aging to help needy state residents access the prescription assistance programs. COCAA is providing training and funding for staff and equipment to expand the program statewide.

Rep. Steele noted, "We're going to see instant results from the implementation of this plan, and it's truly going to help the Oklahomans who are uninsured and underinsured to get life-saving medications they need, as soon as they need them."

Added Sen. Paddack, "Working families in Oklahoma deserve to benefit from programs that help lower the costs of prescription drugs. I am proud of our efforts to assist Oklahomans in need."

State House Speaker Todd Hiett (R-Kellyville) noted the program "brings a business-like approach, emphasizing public-private partnerships to help those who need access to life-saving medications."

COCAA's office in Norman has seven employees and 12 volunteers, according to Julie Lovegrove, Director of RX for Oklahoma. COCAA's Retired and Seniors Volunteer Program (RSVP) and the tax preparation assistance program are housed in the same office suite. RSVP workers help residents process the applications required to obtain medications.

The RX for Oklahoma program grew out of a pilot project sponsored by COCAA and the Oklahoma Pharmacy

Connection Council. Over 3,000 residents received over \$14 million worth of medications they would not have been able to afford.



The open house to announce the launching of the RX for Oklahoma program drew a large crowd.



Julie Lovegrove, director of RX for Oklahoma, (r) gives Ingrid Gifford, Southwest Oklahoma Community Action Group, a tour of the new center in Norman.



State Senator Susan Paddack and Rep. Kris Steele (l) were principal authors of the bill to fund the program. The Norman office is located in Rep. Thad Balkman's (c) district.

Community action facilitators certified

Poverty Simulation offers a realistic look at challenges faced by low-income families

Policy makers and community leaders across the Oklahoma will soon have an opportunity to experience the virtual realities faced by low-income families through a unique poverty simulation.

The Oklahoma Department of Commerce purchased simulation kits and trained facilitators to assist community groups that would like to host a poverty simulation.

Newly certified facilitators include

Michael E. Jones, executive director, and Bob Brandenburg, communications director, Oklahoma Association of Community Action Agencies; Jean Cooper, executive director, and Mary Ann Overall, services director, Northeast Oklahoma Community Action Agency.

During the simulation, participants role-play the lives of low-income families from single parents trying to

care for their children to senior citizens trying to maintain their self-sufficiency on Social Security. The task for each family is to provide food, shelter and other basic necessities during the simulation while interacting with various community resources.

Commerce hosted a poverty simulation in Oklahoma City last October. The Missouri Association for Community Action developed the poverty simulation.

Bob Yandell retiring from Little Dixie

Bob Yandell is retiring from Little Dixie Community Action Agency after working there for 37 years.

He started working for the agency in 1969 as a Neighborhood Center director. He became executive director in 1993 and served in that capacity until January 2005. At the request of the agency's new executive director Randall Erwin, Yandell has remained with the agency as deputy director during the past year.

Shortly after becoming executive director, Yandell led Little Dixie and the

communities it represents through the strategic planning process that resulted in a large part of the agency's service area being designated as a federal Enterprise Community. This opened the door to a host of economic opportunities.

Under Yandell's leadership, a myriad of new jobs through economic development and revolving loan programs were created. He stressed tourism development to bring dollars into Little Dixie's impoverished area.

Regional Administrator Leadership Awards presented during ACF Region VI Technical Institute in Dallas

Leslie Porter, director of Muskogee County Head Start, was presented a Regional Administrator Leadership Award during the Administration for Children and Families Region VI 2006 Technical Institute in Dallas.

She was recognized for supporting an innovative mental health initiative in the Head Start program, according to Dean Williams, chief executive officer of Green Country Behavioral Health Services.

A second Regional Administrator Leadership Award was presented to Williams for a behavioral health services pilot project for children enrolled in the Head Start program.

Green Country is the grantee for the Head Start program.

Recognized along with Williams were Dr. Bruce Perry, MD, Houston; Dr. Donald Smith, Jr., PhD., Dallas; Dr. Rick Gaskill, EdD., Summit County, Kansas; and Susan Hall, MSW, Oklahoma State Department of Human Services.

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