



Weed and Seed Volunteer Income Tax Assistance Program

OFFICE OF JUSTICE PROGRAMS
Community Capacity Development Office

Final Report
July 2007



2007 Performance Achievements

- 102 Active W&S VITA Center Locations
- 1,000+ Volunteers Mobilized
- 24,400 Tax Returns Prepared

- Aggregate Income of Filers= \$405,000,000
- Aggregate Earned Income Tax Credit= \$11,000,000
- Aggregate Child Tax Credit= \$5,000,000

- Aggregate Refunds= \$28,600,000
- Tax Preparation Fees saved= $24,400 \times \$295 = \$7,200,000$

- **Total value to residents= \$35,800,000**



2007 Program Enhancements

- W&S VITA Manual
- Monthly VITA Technical Assistance Sessions
 - Getting Started/Recruiting Volunteers
 - Training Volunteers
 - Marketing/Outreach—Promoting your VITA Site
 - Planning Kickoffs and Special Events
 - Opening your Site
 - Building Toward the Final Push
 - Recognizing Volunteers
 - Closeout Issues—Celebrate!!!

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Program Enhancements contd.

- IRS engagement of Latino media firms to promote W&S VITA efforts
 - Provided Spanish language radio and TV PSA's to 237 stations
 - Provided analysis of stations with Weed and Seed VITA sites
- Participation in National EITC Awareness Day
 - All 102 VITA sites received EITC Awareness Day materials and many participated with local IRS partners

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Program Enhancements contd.

- Launched Network Center for VITA Users
 - Technical assistance and resources for WS communities
 - Peer-to-Peer Learning and Information Center
 - Readiness survey for WSC
 - Sample Outreach and EITC Promotion Materials
 - Spanish Translations of Outreach Materials
 - IRS Updates

Program Enhancements cont'd

View of VITA Network Center










VITA Centers - Network Center (Colleen Coppie) - Microsoft Internet Explorer provided by U.S. Department of Justice

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites

Address <http://ccdonc.ncjrs.gov/forums/19/ShowForum.aspx> Go

Links Customize Links Free Hotmail OJP Portal Windows Windows Marketplace Windows Media

 W&S VITA Site Readiness Survey by Colleen Coppie	by Colleen Coppie 01-08-2007 8:16 PM	-	71
 Tax Credit Stuffers in English-Omaha by Colleen Coppie	by Colleen Coppie 12-12-2006 2:13 PM	-	28
 Sample Tax Credit Flyer-Spanish from Omaha by Colleen Coppie	by Colleen Coppie 12-12-2006 2:11 PM	-	15
 Outreach Letter to Employers-Omaha by Colleen Coppie	by Colleen Coppie 12-12-2006 2:07 PM	-	17
 Outreach Letter to Organizations-Omaha by Colleen Coppie	by Colleen Coppie 12-12-2006 2:05 PM	-	15
 Tax Credit Stuffers in Spanish-Omaha by Colleen Coppie	by Colleen Coppie 12-12-2006 2:03 PM	-	7
 VITA Volunteer Recruitment Flyer by Colleen Coppie	by Colleen Coppie 12-12-2006 2:00 PM	-	16
 Sample VITA Volunteer Application-Omaha by Colleen Coppie	by Colleen Coppie 12-12-2006 1:52 PM	-	12
 Birmingham VITA Pay Check Insert Example by Colleen Coppie	by Colleen Coppie 12-12-2006 4:16 PM	-	13

post options

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Network Center » CCDO Network Ce... » VITA Centers

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Program Enhancements contd.

- One OJP Initiative

- Partnership with OJJDP to involve Tribal Youth Program grantees in VITA Initiative
- Outreach, selection, and orientation of tribal sites
- Individualized technical assistance and consultation
 - Pascua Yaqui Tribe, Tucson, AZ
 - Sault Ste. Marie Tribe of Chippewa Indians, Sault Ste. Marie, MI
 - Blackfeet Tribe, Browning, MT
 - Lower Elwha Klallam Tribe, Port Angeles, WA
 - Quinalt Tribe, Tahola, WA
 - Lac du Flambeau Tribe, Lac du Flambeau, WI



National Promotion of WS VITA

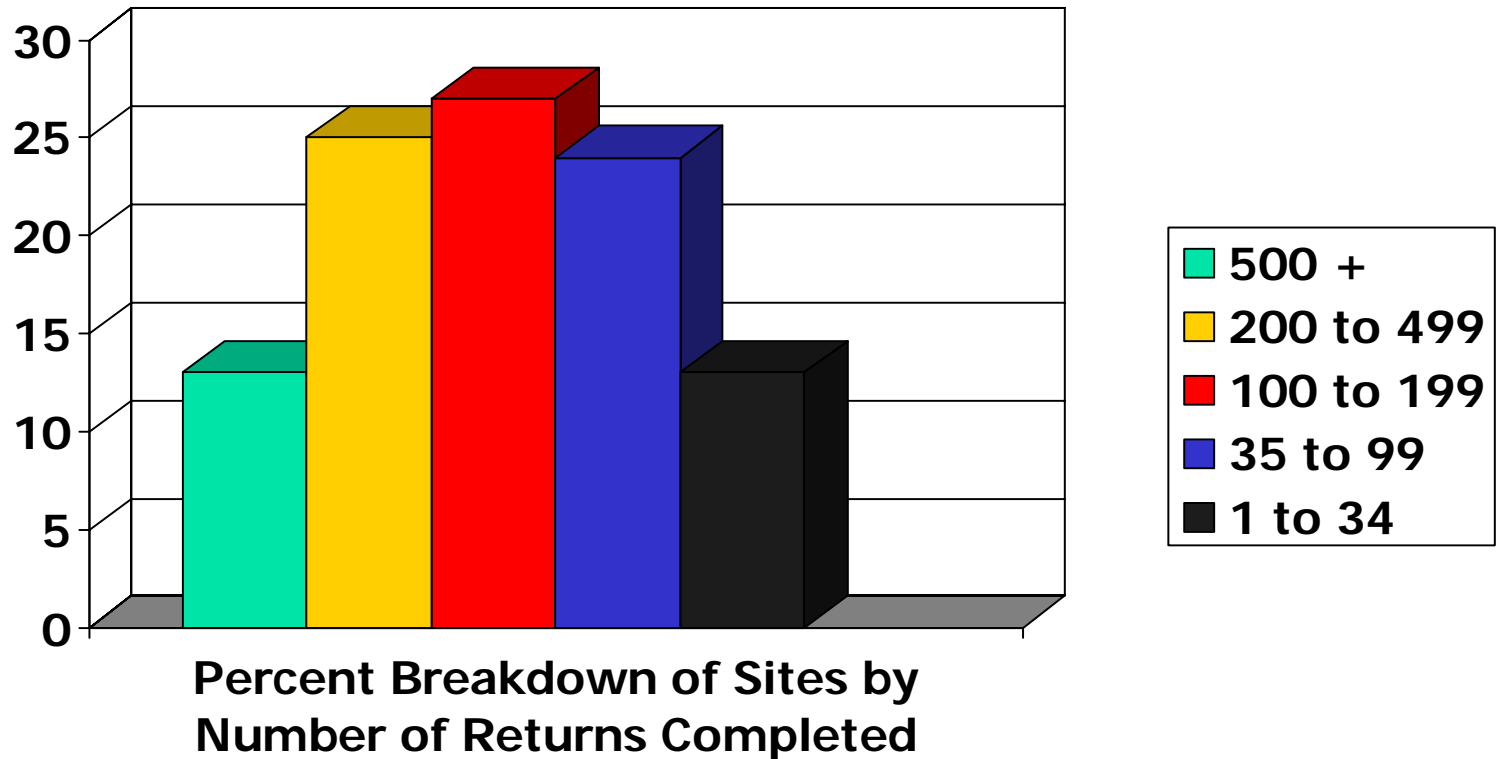
- Birmingham W&S VITA featured by National Tax Coalition
- In-Sites Summer 2007:
 - “Pascua Yaqui VITA Center a Success”
 - “In the Spotlight: Friendly Temple Church VITA Center”
 - “Rockwood VITA Tax Aide Center Aids Residents”
- In-Sites Spring 2007:
 - “Northside Community VITA Program is a Success”
 - “VITA Site Tests Refund-Anticipation Loan Program”
- In-Sites Summer 2006:
 - “VITA Centers Reveal Their Success”
- Promotion to Latino-based telecommunications markets (237 outlets)

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Special Highlights

- National recognition and media coverage of W&S VITA programs
- Atlanta W&S Site asked to testify before Congress on VITA program
- IRS Commissioner visited Atlanta W&S Seed VITA site
- CCDO invited to participate in unprecedented IRS Press Conference for National EITC Awareness Day
- Manchester, NH: First VITA to offer Refund Anticipation Loans

2007 Tax Preparation Performance



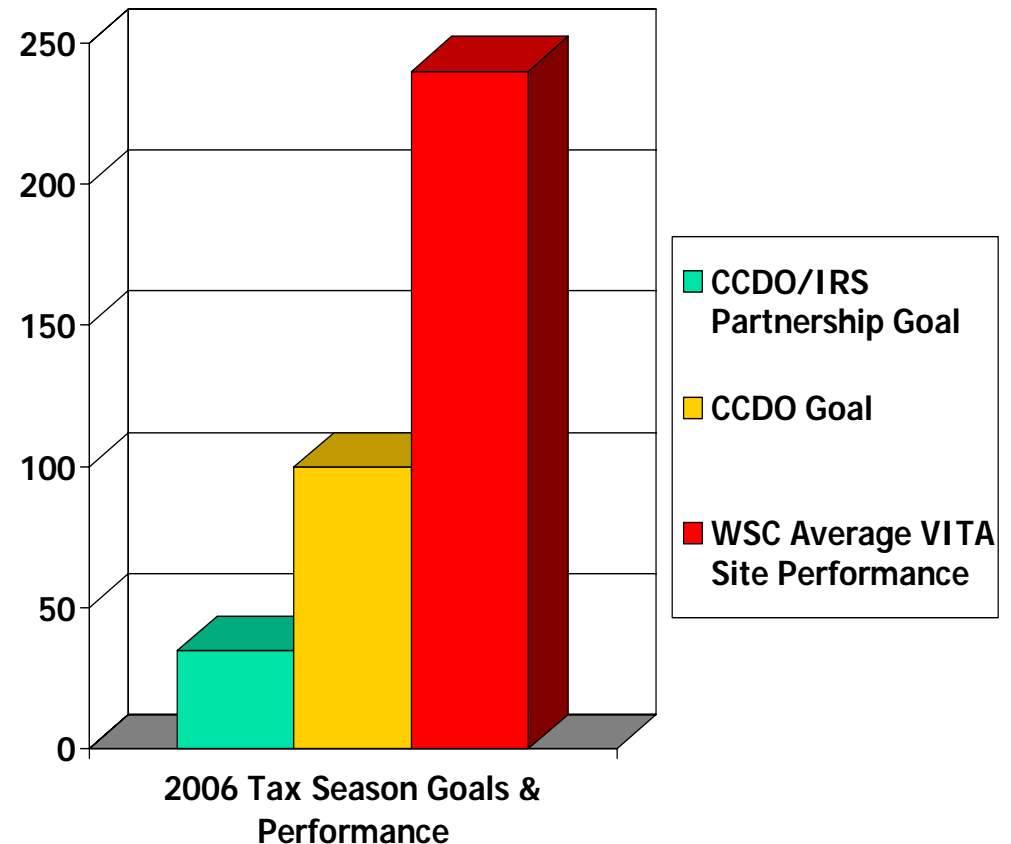
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W&S VITA Center Performance

- 65% of W&S VITA Centers met or exceeded the CCDO goal of 100 tax returns
- 87% of W&S VITA Centers met or exceeded the IRS/CCDO Partnership goal of 35 tax returns
- W&S VITA Sites averaged 240 returns

W&S VITA Performance Goals

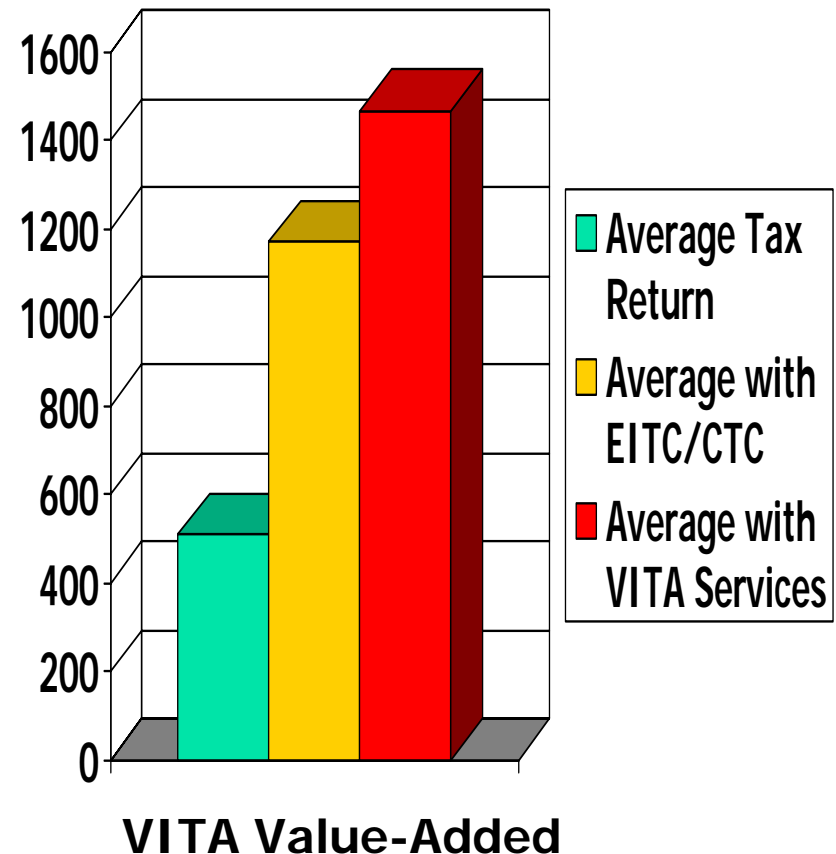
- Performance goals based on the Memorandum of Understanding between the IRS/SPEC, Office of Justice Programs/CCDO, and the Weed and Seed Communities.



CCDO Value-Added to WSC

Disposable Income Available to Taxpayers Through W&S VITA Services

- Average return before EITC and VITA Services=\$508
- Average EITC/CTC benefit=\$664
- Free Tax Preparation Services=\$295 avg.
- Value of Average WSC Returns with VITA Services=\$1,467





Changing Lives- Impact Stories

- A young lady who had not completed her taxes for three years was in fear of having to pay an unimaginable amount to the government but she actually received a refund of \$14,000, after filing overdue taxes with a WSC VITA Center.

She had recently lost her son to violence, so the money helped to her to get back on her feet after being out of work for some time.



Changing Lives- Impact Stories cont.

- One young couple came in to the VITA Center who have 6 children between them and who had not had a tax refund for the last two years because of student loans. The VITA Center has been doing their taxes for the last three years.

This year they finally got a \$5,500 refund which they used to put a down payment on their first home. They are now the happy owners of a four bedroom two bath home that they are extremely proud of.



Changing Lives- Impact Stories cont.

- A woman living in a motel with her niece for over a year could not afford to get into a house because she didn't have money for first and last months rent and utility deposits.

With the Child Tax Credit and EITC she received over \$6,000 back as a tax refund and was able to find a house and also buy some furniture.

- A couple who couldn't afford to get married, but had been living together for three years and had two children received a \$3,000 tax refund. They were able to get married and take a small honeymoon.



Changing Lives- Impact Stories cont.

- A single-parent of 2 children had not filed taxes since her divorce. The W&S VITA Center filed her taxes from 2003-2006 saving her hundreds of dollars on fees and more importantly a refund of over \$12,000 which helped her payoff all her debts and open a savings account.
- A taxpayer came in, almost in tears. He and his wife had been trying to do their tax return, but he hadn't received a W-2. His employer refused to provide him one and fired him on the spot when he asked for it.
The VITA Center helped him do an estimated W-2 form and he was able to get his taxes filed.

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Changing Lives- Impact Stories cont.

- A woman who had paid \$300 to have her taxes done, had her return rejected because someone else had falsely claimed her child as a dependent. The paid preparer refused to correct it because 'it was her fault.'

She came in to the VITA Center for assistance. They filed a challenge to the claim on her child and found additional errors in the return that resulted in a refund of \$3000.

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Changing Lives- Impact Stories cont.

- A 56 year old woman received her refund check in the mail after going to a private tax preparer. She doesn't have a bank account and when she tried to cash her \$7,000 check the fees were going to be 10%.

She came to the W&S VITA site where they opened a checking account for her with their banking partner. She will be coming to them next year to have her taxes prepared for free.



Changing Lives- Impact Stories cont.

- A woman, who had been previously been having her taxes done by a paid preparer, got back \$2,700 when she had her taxes prepared by a W&S VITA Center.

She came in to pay a fee she thought she owed when she received her refund (based on her experience with the paid preparer).

When she was told that the service was free and all the money was hers, she started to cry and said that she had always been charged a big fee and now she could afford to buy a car.



Changing Lives- Impact Stories cont.

- A couple, who are clients of a related Individual Development Account program, came to a pre-tax workshop on the EITC and got their taxes prepared at the VITA Center.

They used their refund to complete their savings in the IDA program and bought their new home in South Omaha.

Note: All VITA impact stories cited were provided by Weed and Seed VITA Sites.

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Local Innovative Strategies for Outreach

- Free “Tax Preparation” Coupons
- Free groceries provided by the Food Bank
- Campaign to “Spend Some, Save Some, Invest Some”
- Free Child Care provided
- Mail inserts promoting VITA included in City utility bills and on City websites
- Trained bank tellers and social service agencies about VITA and EITC to increase referrals

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Additional Services Provided

- Credit Counseling
- Credit Reports
- Opening Bank Accounts
- Referrals to other services
- Financial Education
- Individual Development Accounts
- State returns
- Out of state hurricane victim returns
- Workforce Development

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FY 2007-2008 Remediation Strategy

- Remediation Plans for each site not meeting the CCDO goal of 100 returns
- Individual technical assistance provided to local sites:
 - Joint conversations with the local IRS SPEC liaison, W&S Coordinator and VITA Coordinator
 - Identification of barriers to performance
 - Written plan submitted by the WS VITA site to address barriers
 - Specific TA needs identified
 - Ongoing follow up on implementation of the remediation plan

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Remediation Strategy- cont.

- Conduct needs assessment for WS VITA sites
- Develop agenda and topics for monthly VITA technical assistance conference calls
- Coordinate training and technical assistance needs with the IRS
- Provide additional EITC/VITA resources through the Network Center
- Focus on connecting VITA sites to additional asset development strategies

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Remediation Strategy- cont.

- Provide guidance on volunteer outreach and training
- Continue technical assistance on WSC promotion of EITC and VITA services
- Provide assistance with development of individual WSC marketing and performance plans
- Continue to guide WSC VITA's to link with other asset development opportunities to enhance economic development/neighborhood restoration strategies