



Weed and Seed Volunteer Income Tax Assistance Program

OFFICE OF JUSTICE PROGRAMS
Community Capacity Development Office

Final Report
July 2008



2008 Performance Achievements

- 107 Active W&S VITA Center Locations
- 1,000+ Volunteers Mobilized
- 34,000 Tax Returns Prepared

- Aggregate Earned Income Tax Credit= \$14,000,000
- Aggregate Child Tax Credit= \$6,000,000

- Aggregate Refunds= \$34,500,000
- Tax Preparation Fees saved= 34,000 x \$295= \$10,000,000

- **Total value to residents= \$44,500,000**



Comparison 2007-2008

■ 2007

- 102 sites
- 24,400 Returns
- 28,600,000 Total Refunds
- \$7,200,000 Savings in Fees
- \$35,800,000 Total Value

■ 2008

- 107 sites
- 34,000 Returns (+28%)
- 34,500,000 Total Refunds (+18%)
- \$10,000,000 Savings in Fees
- \$44,500,000 Total Value (+20%)

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Program Enhancements

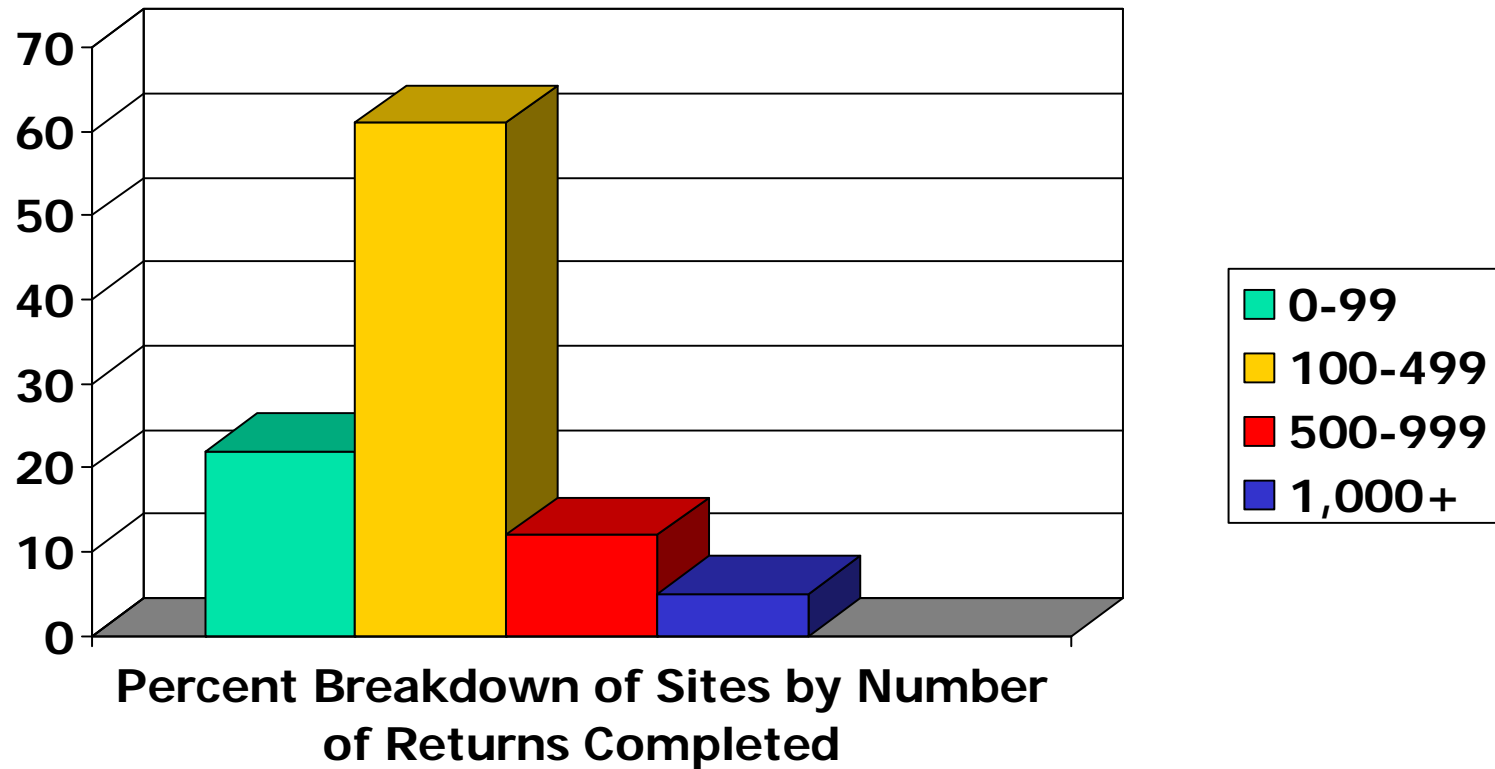
- Tribal Sites
 - Pascua Yaqui Tribe, Tucson, AZ
 - Sault Ste. Marie Tribe of Chippewa Indians, Sault Ste. Marie, MI
 - Blackfeet Tribe, Browning, MT
 - Lower Elwha Klallam Tribe, Port Angeles, WA
 - Quinalt Tribe, Tahola, WA
 - Lac du Flambeau Tribe, Lac du Flambeau, WI

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Program Enhancements

- **Wachovia Bank VITA Sites:**
 - Healthy Oakland—Oakland, CA
 - Allen Temple—Oakland, CA
 - Visitacion Valley Beacon—San Francisco, CA
 - Roybal Center, Los Angeles, CA
 - CARCEN—Los Angeles, CA
 - Bridgeport YMCA--Bridgeport, CT

2008 Tax Preparation Performance



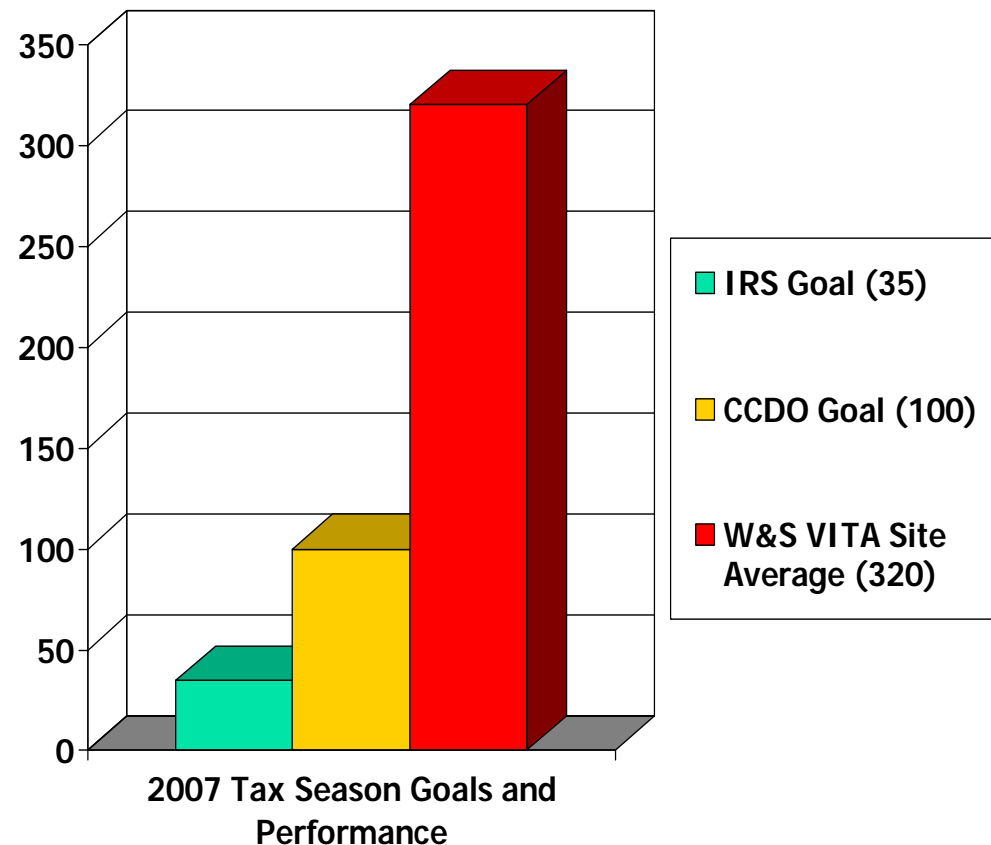
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W&S VITA Center Performance

- 78% of W&S VITA Centers met or exceeded the CCDO goal of 100 tax returns
- 61% of W&S VITA Centers averaged between 100 and 499 returns
- 17% of W&S VITA Centers exceeded 500 returns
- W&S VITA Centers averaged 320 returns

W&S VITA Performance Goals

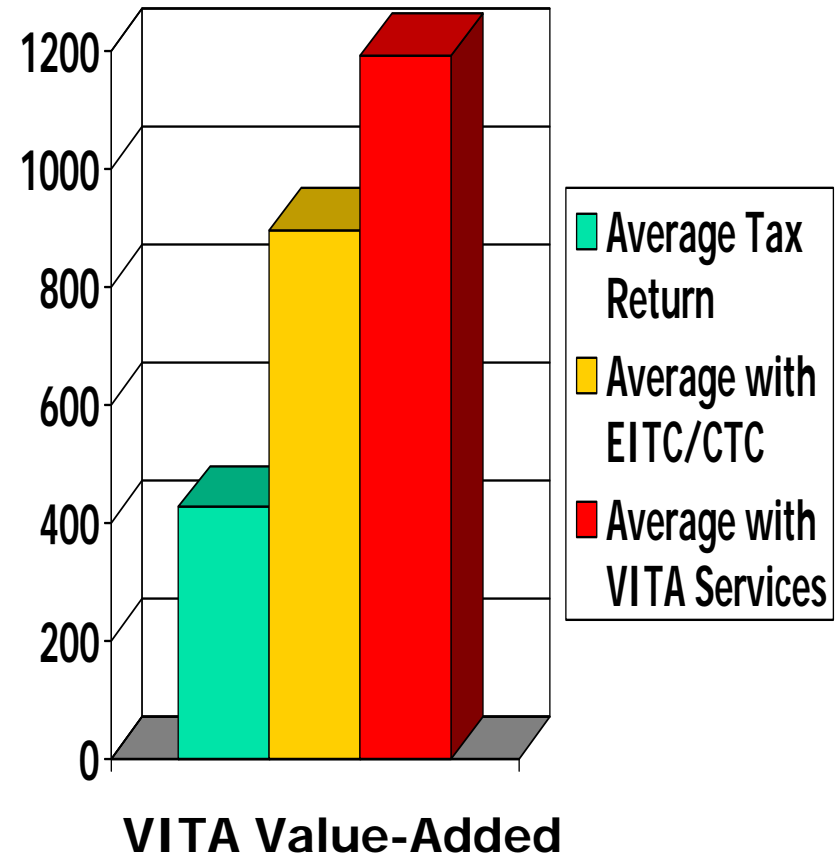
- Performance goals based on the Memorandum of Understanding between the IRS/SPEC, Office of Justice Programs/CCDO, and the Weed and Seed Communities.



CCDO Value-Added to WSC

Disposable Income Available to Taxpayers Through W&S VITA Services

- Average return before EITC and VITA Services=\$426
- Average EITC/CTC benefit=\$471
- Free Tax Preparation Services=\$295 avg.
- Value of Average W&S Returns with VITA Services=\$1,192



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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