

VITA Impact Statement

ABOUT THE VITA PROGRAM

The goal of the VITA program is to provide free tax preparation to underserved individuals in the community, especially low-income workers, the elderly, and individuals with disabilities. It is a primary objective to help eligible taxpayers receive the Earned Income Tax Credit (EITC) to improve their financial stability. VITA also gives financial information and guidance to clients who are struggling to make ends meet. The EITC refund and service referrals help secure families against financial hardship and potential poverty. Through our efforts, Capital Area United Way (CAUW) will ensure income stability for families, and strengthen the Capital Area community.

Capital Area United Way (CAUW) envisions a Volunteer Income Tax Assistance (VITA) program that moves the needle from the standard transactional approach of preparing an individual's taxes toward a transformational client experience. Traditionally, VITA programs nationwide provide free income tax preparation assistance to low-to-moderate income (LMI), elderly, disabled, and limited English speaking individuals. The transformation in Louisiana's Capital Area occurs when we leverage VITA to accurately identify and address taxpayer needs in: financial capability and tax time savings, adequate and affordable healthcare coverage, access to free legal advice and estate planning, and additional community resource service referrals.

COMMUNITY IMPACT

With roughly 21% of our region's population living below 125% of the federal poverty threshold, it is not surprising to learn that the average VITA client family income is \$25,000. VITA volunteers serve these clients, many of whom qualify for special refunds and credits like the Earned Income Tax Credit (EITC) and the Child Tax Credit (CTC).

Collectively, in 2017, 185 VITA volunteers prepared over 6,200 federal and state returns, infusing households in our local communities with over \$8 million in federal refunds and \$3 million in EITC. The VITA program contributes to individual and family stability by ensuring that qualifying households earning less than \$55,000 receive the EITC, which is considered one of the most effective anti-poverty tools.

In 2017, CAUW engaged volunteers and clients in numerous financial capability mechanisms. 75 individuals attended financial education and pro-bono legal workshops. 91 VITA clients utilized IRS Form 8888 to put at least \$50 of their refund into savings,

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an increase from 2016. This increase can be attributed to three innovations in this year's VITA program: 1. Volunteer training on form 8888 was implemented in greater detail; 2. Tax client savers were encouraged to enter a national weekly raffle with SaveYourRefund; and 3. Super Tax Day tax-time savers were incentivized via partner-sponsored scratch-off cards for cash prizes. Over 1,100 clients requested community resource referrals for flood resources, financial education, or legal aid, facilitating engaged and transformational experiences for clients, and also bridge the gap between LMI individuals and the financial, nonprofit, and professional sectors.

2018 TAX SEASON GOALS

During our 2018 tax season, CAUW is committed to increase tax-time savings and financial capability integration into VITA's client services, which are estimated to serve 6,500. During 2018, a minimum of 650 federal tax return clients will complete the following steps during the tax prep process: Form 8888, Save Your Refund weekly drawing entry, and GeauxSave pledge. A minimum of 50 individuals will be enrolled in these tax-time savings mechanisms at Super Tax Day. Targeted goals and data collection methods are overseen by Site Coordinators and managed by CAUW. Additional focus will be placed on ensuring financial capability materials make it into the hands of 100% of CAUW VITA clients served.

In 2018, CAUW's VITA program aims to transform operational approaches to increase efficiency, productivity, and ultimately benefit both the volunteer and client experience. For the 2018 tax season, CAUW will:

1. Engage VITA Coalition partners in strategy building and VITA programming implementation
2. Engage government and public officials during 2018 VITA season, including specific invitations to participate in Super Tax Day and neighborhood client outreach efforts
3. Utilize volunteer expertise in VITA training curriculum development, implementation, and post-training assessments
4. Hold a minimum of 15 VITA trainings to cover traditional and innovative subjects
5. Implement a robust VITA client scheduling system, integrated with 2-1-1, text, and online options
6. Offer pro-bono legal services and referrals and healthcare navigation at all VITA sites
7. Implement a disability workshop and disability-specific mobile sites throughout the 10-parish region
8. Implement Get Connected volunteer management systems to enable volunteer tracking and impact reporting
9. Publicly acknowledge VITA supporters
10. Continue to research national VITA best practices, and disseminate local data findings and proven innovations with local, regional, and national VITA cohorts

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SUPER TAX DAY

As a kick-off to the Volunteer Income Tax Assistance (VITA) tax season, Capital Area United Way (CAUW) is enthusiastic to host the 2018 VITA Super Tax Day, an all-day free tax preparation event for the Louisiana Capital area. Located in the heart of the Baton Rouge, the 2018 Super Tax Day event will provide 300 low and moderate income individuals with free tax preparation appointments and services, affordable health care navigation, community resource referrals, increased savings opportunities, and pro-bono legal advice in a festival-type environment.

CAUW has a vision of helping low and moderate income individuals in our community to be lifted out of poverty through access to the Earned Income Tax Credit (EITC); the VITA program plays a crucial role in allowing qualifying individuals access to obtain these credits. With an average Baton Rouge VITA client household income being less than \$25,000 per year, the 2018 Super Tax Day kick-off event will provide the opportunity to jumpstart the VITA filing season with added energy and exposure for those in our community who need it most. In the past three years, over 370 individual tax returns were prepared for free at Super Tax Day events in Baton Rouge, with \$336,797 in EITC and \$614,976 in total refunds going back into the homes of low and moderate income VITA clients.

CAUW's 2018 Super Tax Day goal is to increase to 300 individual tax returns filed, totaling an estimated \$500,000 in total refunds and \$250,000 in EITC being returned to taxpayers. This goal will be accomplished through CAUW robust volunteer recruitment and engagement activities. Corporate partner incentives programs encourage professionals to participate as VITA volunteers at Super Tax Day, further adding support and sustainability to the event and the entire tax season.

CAUW will orchestrate pre-Super Tax Day trainings to ensure volunteer and site preparedness, and will additionally mandate that the Greater Baton Rouge VITA sites are closed on Super Tax Day, to allow all volunteers to participate in the kick-off event. Food, welcoming facilities, ample parking, paid mileage, double-matches to employee grants, and additional friendly-competitions for prizes will be implemented by CAUW, and numerous organizations to further encourage volunteer sign-ups and day-of engagement.

With an anticipated increase in market saturation for this year's Super Tax Day, 20,000 prospective clients will be reached November 2017 through February 2018. A majority of these individuals will receive multiple marketing solicitations informing, and reinforcing the knowledge, of CAUW VITA's free tax preparation services, financial capability incentives and programming,

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and additional community resources across the 10-parish region. CAUW will prepare and launch focused messaging regarding the benefits of the Earned Income Tax Credit via numerous methods of outreach, including: radio spots in multiple languages four weeks prior to Super Tax Day and for two weeks after; live radio broadcast coverage for two hours during the event to encourage walk-in clients; newspaper advertisements; flyer, digital banner, and yard sign creation and distribution to over 60 organizations and 20 permanent VITA sites; community partner website presence and mobile advertising; EITC and Super Tax Day specific direct-mail and online bill inserts to utility clients; Facebook and Twitter social media posts scheduled for four weeks prior to and two weeks following Super Tax Day; and automated calls made to all eligible (zip code-specific) clients. CAUW will engage additional partners to facilitate cross-promotion of these goals to further saturate the market.

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