



**VITA**  
VOLUNTEER INCOME TAX ASSISTANCE  
Sponsored by Transamerica

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United Way  
of East Central Iowa

# 2017 VITA TAX YEAR REPORT

# Supporting Our Community



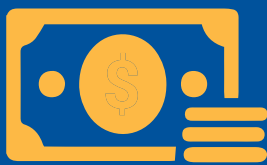
**2,225**  
federal  
returns  
prepared



**\$1.69 million**  
in Total Earned Income  
and Child Tax Credits



**\$1,689**  
average  
federal  
refund



**\$310,816**  
saved by filing  
with VITA

**\$1**  
investment  
**\$9.42**  
saved in our community



Sponsored by the Internal Revenue Service (IRS) and coordinated by the Iowa Center for Economic Success, the Volunteer Income Tax Assistance (VITA) program assists low- to middle-income families with filing their federal and state income tax returns.

VITA program depends on a dedicated team of volunteers. Led by five site coordinators, these individuals provided more than 4,703 hours of volunteer time at three sites, during the three months sites were open. In addition to the onsite volunteering, each tax preparer volunteer invested an additional 30 hours in training, scenarios, studying tax laws, and passing IRS certification tests.

## The Commitment

One of United Way of East Central Iowa's goals is to increase the financial stability of individuals and families in our community. This program provides a pathway to financial stability for clients who use VITA's services. In addition to preparing returns, VITA volunteers share financial experiences and resources to guide clients to responsible saving and financial stability.

- VITA offered multiple sites in Linn and Jones Counties.
- Volunteers demonstrated their commitment by participating in long hours of training, before and after work to assist with unique challenges, and reviewing IRS provided information.
- All volunteers were certified by the IRS.

## The Process

VITA provides the community with a group of trained tax preparers who assist taxpayers by preparing their tax returns.

- Volunteers receive training and testing through an IRS-administered test.
- Clients call 2-1-1 to schedule a tax appointment.
- During a VITA appointment, the client completes an intake form, consults with a tax preparer, and finally consults with a quality reviewer.
- The taxpayer then signs a form to allow VITA to electronically file their federal and state returns.
- When filed electronically, federal refunds arrive in 10–14 days.

## 2017 Quick VITA Stats

### Filing status

Single Male	560
Single Female	1,061
Married	287

### Average adjusted gross income

\$22,986.55

### Scheduled Appointments

7,239

### Increase in number of returns from last year

7.5%

## Year-to-Year Stats

### Total refunded by tax year

2014  
\$2,824,303

2015  
\$3,199,872

2016  
\$3,351,414

2017  
\$3,602,601

## The Stories

While there are many personal stories told by VITA clients, the overwhelming response is one of relief, gratitude, and the fulfillment of meeting their civic responsibility. Stories that illustrate the power of the VITA program include:

### From a homeless shelter to a home

After using VITA, a single mother received a federal refund totaling more than \$11,000. The child tax credit, earned income credit, and education credit all contributed to her total return.

The VITA volunteer asked the young mother what she planned to do with her refund. Through tears of joy, she said, "We have been living in a shelter, and I was going to stay there until I was done with school. But now, I can make a home for them."

### More than a grandfather imagined

When VITA finished taxes for a local man, he didn't understand why the refund was more than in the past. The volunteer tax preparer explained the credits he received and recommended he bring in his past returns so they could be reviewed.

Since the man was raising his grandson on his own, the volunteer noticed an incorrect filing status on past returns. He had not claimed the child tax credit, earned income credit, or education credits since his grandson started college. Using VITA, the grandfather claimed an additional \$4,000 refund.





# Celebrating Our VITA Volunteers

## Most Volunteers Hours

**282 hours**

Bill Holtz

## Most Returns Completed

**137 returns**

Melissa Doyle

## Rookies of the Year

Mark Prowant

Valerie Mazzone

## VITA Hat: First Year MVP

Josh Hervey

## Our Sponsors and Partners

- Financial support provided by:
  - Transamerica
  - Iowa Center for Economic Success
  - Wells Fargo
  - University of Iowa Community Credit Union
- Hosting support provided by:
  - Horizons: A Family Service Alliance
  - Linn Area Credit Union
  - Ladd Library
- Appointment scheduling provided by United Way 2-1-1

## 2017 Tax Season Highlights

- Supported the African community at the Catherine McAuley Center and St. Jude's Catholic Church
- Introduced the drop off process to provide easy access to tax return assistance at Ladd Library and Linn Area Credit Union.
- Supported the VITA program in Washington County as a drop off site
- Developed innovative marketing procedures to inform clients about the drop off process and what to bring to their appointments
- Expanded the role of the site coordinators and recruited new tax preparer volunteers

## 2018 Tax Season Plans

- Provide greater access to tax preparation services with multiple intake sites
- Provide additional training opportunities for volunteers
- Recruit 10% more tax preparer volunteers.
- Increase number of filed tax returns by 5%
- Expand training sessions to enable all volunteers to become certified in Health Saving Accounts

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