



**VITA**  
VOLUNTEER INCOME TAX ASSISTANCE



United Way  
of East Central Iowa

# 2018 VITA TAX YEAR REPORT

# Supporting Our Community



**2,239**  
federal  
returns  
prepared

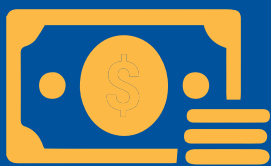


**\$1.47 million**

in Total Earned Income  
and Child Tax Credits



**\$1,818**  
average  
federal  
refund



**\$342,900**  
saved by filing  
with VITA



1,349  
hours  
in tax  
training

3,737  
hours  
at tax  
sites

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 had its share of challenges this year (tax year 2018), including tax law changes that went into effect in 2019, training an additional 25 new volunteers, and brutal weather in February. The VITA team was able to improve on last year's performance and continued to provide a meaningful service to our community. Led by experienced site coordinators, VITA volunteers devoted 5,000+ hours of time to training, certification tests, and serving at five tax preparation sites.

## 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. VITA provides a pathway for financial stability.

- VITA offered sites in Linn, Jones, and Washington Counties.
- Volunteers assisted with a variety of needs, including providing appointment scheduling, a smooth drop off process, and walk-in tax preparation sessions.
- Volunteers demonstrated their commitment by participating in long hours of training, before and after hours work, to assist unique client circumstances, and to review IRS-provided information.
- The heart of VITA is the training and studying required for volunteer tax preparers. This training leads to the IRS certification at the Advanced Level for the tax preparers.

## The Process

- VITA provides the community with trained tax preparers who prepare tax returns at no cost.
- Both volunteer greeters and tax preparers receive training and certification through an IRS administered test.
- Clients call 2-1-1 to schedule an appointment or locate a drop off site.
- When clients arrive at an appointment site, they complete an intake form, meet with a tax preparer, and then review their return with a reviewer to ensure everything is accurate.
- The taxpayer then signs a form to allow the VITA program to electronically file their federal and state returns.



## The Quick Stats

### Filing status

Single Male	603
Single Female	1,171
Married	365

### Average adjusted gross income

\$22,986.55

### Clients who were low-income

85%

### Clients who were elderly

80%

### Clients who were veterans

8.4%

### Total refunded by tax year

2014	2015	2016	2017	2018
\$2,824,303	\$3,199,872	\$3,351,414	\$3,602,601	\$3,813,548

## The Stories

While there are a multitude of stories told by the VITA clients, the overwhelming feelings of relief, gratitude, and fulfillment of meeting their civic responsibility are consistent throughout program.

### A reassuring presence

A woman visited the VITA drop off site at Linn Area Credit Union in Marion and was emotionally distraught. The VITA volunteers immediately asked her what was wrong and she said, "One of my friends told me I am going to owe more than \$3,000 because of the tax law changes." After she handed them her tax documents, the volunteers could tell she would not owe anything and, in fact, would receive a refund. When they explained why, she broke down in tears and thanked them for their help.

### More than a grandmother imagined

An elderly woman told the VITA volunteers she helps care for her grandchildren and couldn't drive them places because her van needed repairs. After the volunteers prepared her tax return, she was so excited and surprised! She explained the refund was large enough to completely repair her van and even have some money left over.

# VITA Volunteer Voices

“Volunteering with VITA is rewarding because it gives me a chance to **GIVE BACK TO PEOPLE WHO ARE WORKING HARD TO ACHIEVE THEIR DREAMS.**”

“**VOLUNTEERING WITH VITA IS HUMBLING!** To help a family or individual, to help them recover their hard earned money, it is heartwarming.”

“It is always gratifying to see a return go to **SOME WHO WILL REALLY BENEFIT FROM GETTING THAT MONEY BACK.**”

## Our Sponsors and Partners

- Financial support provided by:
  - Transamerica
  - Iowa Center for Economic Success
  - Wells Fargo
  - Linn Area Credit Union
  - University of Iowa Community Credit Union
- Hosting support provided by:
  - Horizons: A Family Service Alliance
  - Cedar Rapids Public Library – Ladd Library
  - US Bank – Washington, IA
- Appointment scheduling provided by United Way 2-1-1

## 2018 Tax Season Highlights

- Significantly increased the number of VITA volunteers to grow the program to more than 100 volunteers
- Increased number of tax drop off locations to provide easy access to tax return assistance
- Supported the VITA program in Washington County by coordinating their drop off site
- Created special days for walk-in service
- Expanded the role of the site coordinator and introduced a new group of site leaders

## 2019 Tax Season Plans

- Provide greater access to tax preparation services with increased drop off locations
- Expand the number of clients that can be served at appointment locations
- Provide additional training opportunities for volunteers to acquire specialized tax preparation certifications
- Recruit more tax preparers to serve as site coordinators
- Increase number of filed tax returns by 5%

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