



VITA
VOLUNTEER INCOME TAX ASSISTANCE

United Way
United Way
of East Central Iowa

2019 VITA TAX YEAR REPORT

Supporting Our Community



1,719
federal
returns
prepared



\$882,153
in Total Earned Income
and Child Tax Credits



\$1,547
average
federal
refund



\$263,007
saved by filing
with VITA



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 2019), including tax law changes that went into effect in 2020, training an additional 20 new volunteers, and COVID-19 which caused sites to close in mid-March. Despite the pandemic, the VITA team was able to statistically improve on last year's performance and continued to provide a meaningful service to our community. Led by experienced site coordinators, VITA volunteers devoted 2,500+ hours of time to training, certification tests, and serving at five tax preparation sites.

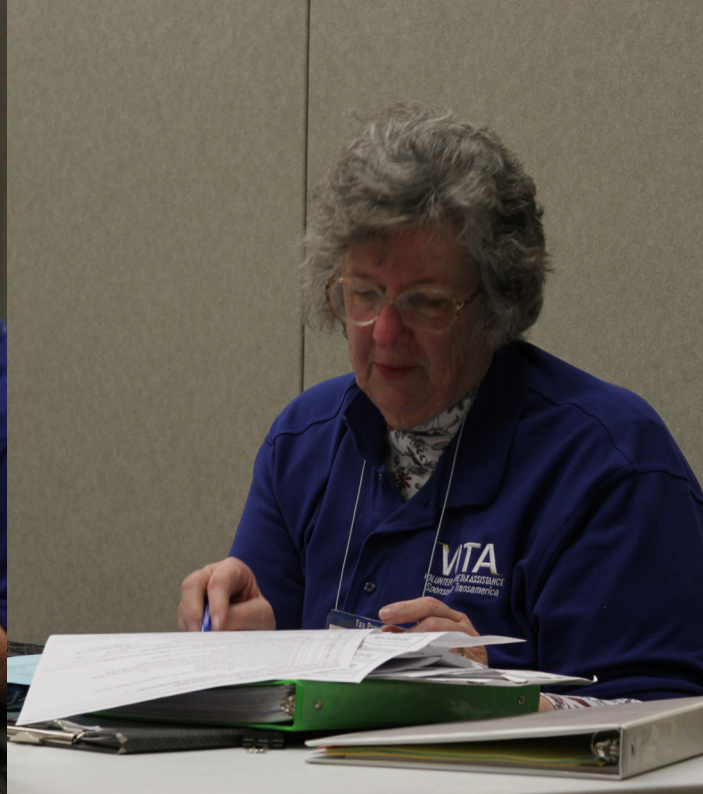
The Commitment

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.



VITA and COVID-19

On March 16, 2020 VITA received notice that they would need to leave their sites. Within 24 hours volunteers were able to close down sites, call clients to cancel, and communicate with the public about the closure for the season. More than 500 appointments were cancelled during the last four weeks of the tax season due to COVID-19.

In June 2020, VITA reopened for clients whose appointments were cancelled in March or April and who still needed help with tax preparation. In two weeks volunteers spent 329 hours taking in and prepared over 125 tax returns for clients.

Total refunded by tax year

2014	2015	2016	2017	2018	2019*
\$2,824,303	\$3,199,872	\$3,351,414	\$3,602,601	\$3,813,548	\$2,658,805

*total may have been impacted due to the COVID-19 pandemic

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 peace of mind experience

An elderly woman heard about VITA and was able to make an appointment to get her taxes done. During her appointment, the woman explained she did not have great experiences with tax preparation after her husband passed away a few years ago, and was thankful for a tax preparation option with no fee. The woman received a clear explanation of what her refund would be, and was excited to have that money for daily expenses and peace of mind.

Navigating parenting together

A divorced couple, who is committed to co-parenting, scheduled their VITA appointments at the same time to see which parent would most benefit in claiming their dependents. When the father realized his children's mother would owe money, he asked the preparers to put the children on her return because he knew the money would be spent on his children. The couple explained that VITA helps them get the most beneficial return possible, thus helping them provide more for their children.

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.**”

“I HAD A CLIENT TELL ME THAT ‘I CHANGED HIS LIFE’ after completing his taxes as his prior year’s tax return had a very different result.”

“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
 - Green State 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

2019 Tax Season Highlights

- Supported the VITA program in Washington County by coordinating their drop off site
- Expanded the role of the site coordinator and introduced a new group of site leaders
- An area of need for tax preparers was Health Savings Accounts (HSA) and all VITA tax preparers were certified in HSA.
- COVID-19 impacted services in mid-March and VITA clients & volunteers adapted quickly to the succession of changes as we had to scale down, cancel, or wrap up tax preparation with 24 hours’ notice.
- Reopened in June 2020 to provide tax preparation to clients whose appointments had been cancelled March & April due to COVID-19.

2020 Tax Season Plans

- Provide greater access to tax preparation services with increased drop off locations
- Recruit more tax preparers to serve as site coordinators
- Increase number of filed tax returns by 5%
- Expand into rural counties to increase access to VITA services.
- Increase best practices to ensure safety for clients and volunteers due to COVID-19.
- Expand virtual and low-contact tax preparation options for clients to reduce the spread of COVID-19.

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