

**Community Development & Housing**

**Volunteer Income Tax Assistance**  
**(VITA)**

**2022-2023 TAX SEASON**

**Community Development Council Committee**  
**May 2, 2023**



# AGENDA

- **Introduction to VITA**
- **VITA Model**
- **Tax Season Results**
- **Cost Benefits**
- **Return on Investment**
- **Program Totals**
- **VITA In Action**

# INTRODUCTION



# VITA Model

- 2 sites “drop-off” 6 sites “in-person”
- All returns required an intake/interview
- Returns are reviewed with the taxpayer prior to filing
- Sites open 6 days a week Monday-Saturday from January 23-April 18
- Operated on an \$8,450 budget for personnel, supplies, and miscellaneous expenses
- Six out of eight VITA sites are in the core city. The two outside its boundaries are the ARC of High Point on E. Bellevue and GTCC Jamestown
- Site flow included a greeter managing the intake process ➡ intake/interviewer to ensure correct information is used for the return ➡ a tax preparer to complete the return ➡ a quality reviewer for a second set of eyes on all returns



# Tax Season Results

- Total Volunteers:
  - **8** greeters
  - **2** schedulers
  - **21** tax preparers
  - **8** Site Supervisors
- Total Volunteer Hours: **1913**
- Total Tax Preparation Hours: **1432.5**
- VITA Hours of Operation: **431**
- Federal and State Tax Returns: **941**
- Total Federal Refunds Issued: **\$717,953**
- Average Taxpayer AGI: **\$26,255**
- Primary or Secondary Taxpayer Age 60+: **695**
- Taxpayer retention: **461**
- Rural Taxpayers: **128**
- Individuals with disabilities: **71**
- IRS audit with no findings

# Cost Benefits

\$250 Average cost of a tax return

\$1020 Average taxpayer refund

941 returns filed

$941 \text{ tax returns} \times \$250 = \$235,250$

\$235,250 back in taxpayer's pockets

$941 \text{ tax returns} \times \$1020 = \$959,820$

Up to \$959,820 back into the local economy

# Return On Investment

Total ROI:  
\$1,008,257

\$235,250  
saved on tax  
prep and back  
in taxpayers  
pockets

\$55,054 in  
state refunds

\$717,953 in  
federal  
refunds



### Volunteer Income Tax Assistance

| TY 2006-2021<br>Cumulative Data | Returns      | Federals Refunds        | EITC                  | Average AGI         |
|---------------------------------|--------------|-------------------------|-----------------------|---------------------|
|                                 | <b>8,947</b> | <b>\$ 10,901,636.00</b> | <b>\$4,255,429.00</b> | <b>\$ 17,495.00</b> |
|                                 |              |                         |                       |                     |
| TY 2022-2023<br>Program Totals  | Returns      | Federal Refunds         | EITC                  | Average AGI         |
|                                 | <b>941</b>   | <b>\$ 717,661.00</b>    | <b>\$ 245,160.00</b>  | <b>\$ 26,422.51</b> |

Program Totals



# VITA IN ACTION

Volunteers @ CNDD



Volunteers @ GTCC Jamestown



Volunteers @ GTCC High Point



# Thank You

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