



Board of Directors Meeting

June 13, 2013

VITA Annual Report

Item VI.C.

Recommended Action: Information Only

Program: Pinellas Volunteer Income Tax Assistance

Strategic Plan Objective: Facilitate relationships promoting collaboration and collective impact, through broad cross-sector engagement focused on achieving significant community change.

Background:

The Internal Revenue Service partners with agencies and coalitions throughout the United States to provide a Volunteer Income Tax Assistance (VITA) program where low to moderate income taxpayers may have their returns prepared and filed for free.

In Pinellas County, IRS partners with the Pinellas Prosperity Partnership (formerly known as the Wealth Building Coalition) to provide VITA services. JWB is a member of the PPP and provides staff assistance for the administration of the VITA program.

During fiscal year 2012-13, financial support for the Pinellas VITA program was provided from the IRS, United Way of the Suncoast, Wells Fargo, Bank of America, Raymond James Bank and PNC Bank. In-kind services are loaned from dozens of not-for-profit and government organizations including: Pinellas County; the cities of St. Petersburg, Pinellas Park, Tarpon Springs and Clearwater; 2-1-1 Tampa Bay Cares, Inc. and *The Weekly Challenger* to name just a few.

Attachment A summarizes the results of the 2013 VITA tax preparation season.



2013 VITA Annual Report



VITA (Volunteer Income Tax Assistance) is a program of the Internal Revenue Service (IRS) partnering with local organizations throughout the United States to offer free income tax preparation and electronic filing for low to moderate income taxpayers. For the 2012 tax year, the maximum adjusted gross income for VITA services was \$51,000.

The Pinellas Prosperity Partnership (formerly the Wealth Building Coalition) oversees VITA services locally with staff support from the Juvenile Welfare Board and monetary support from the IRS, United Way of the Suncoast, Bank of America, Wells Fargo, PNC Bank and Raymond James Bank. Dozens of government, not-for-profit agencies and businesses provide in-kind support for the program.

122 volunteers prepared 3,241 returns at 12 fixed location sites and 6 mobile VITA locations. 21 interns from the USF-St. Petersburg College of Business volunteered a minimum of 75 hours each and 31 students from Stetson College of law volunteered a total of almost 500 hours. At the conclusion of tax season, volunteers and supporters gathered at Sunken Gardens to celebrate another successful VITA year!

The numbers are in! See the next page for results



Clockwise from upper left:

- Dr. James Fellows and USF-St. Petersburg College of Business interns
- Staff from 211 Tampa Bay Cares, Inc.
- Volunteers and staff from the James B. Sanderlin Neighborhood Family Center

SITE	Returns filed	Child Tax Credit Amount	Earned Income Tax Credit Amount	Total Refund Amount
Childs Park YMCA	355	\$36,155	\$233,895	\$614,007
Daystar	196	\$16,007	\$91,228	\$246,407
Enoch Davis Center	724	\$38,800	\$235,580	\$895,798
GRAYDI Neighborhood Family Center	202	\$19,422	\$203,759	\$432,961
High Point NFC	192	\$15,424	\$139,045	\$322,517
Hispanic Outreach Center	88	\$9,420	\$35,311	\$132,687
Sanderlin NFC	622	\$67,682	\$615,677	\$1,355,636
Lealman & Asian NFC	322	\$22,727	\$184,118	\$498,173
Mattie Williams NFC	185	\$22,203	\$127,449	\$320,674
Martin Luther King Jr. NFC	68	\$4,795	\$41,002	\$98,914
TB Beaches Chamber of Commerce	46	\$574	\$15,180	\$315,846
Union Academy NFC	168	\$15,131	\$151,171	\$315,846
Mobile VITA	63	\$4,527	\$11,621	\$79,187
TOTAL	3241	\$272,867	\$2,085,036	\$5,357,567

Who VITA Serves....

VITA services are for low to moderate income taxpayers. The upper adjusted household income level set by the IRS for 2012 was \$51,000.

51% have adjusted gross household income under \$20,000

22% have adjusted gross household income under \$10,000

8.5% are unemployed and seeking work

51% are 55 years old or more

73% are African-American

27% are raising children in their home

5% speak a language other than English at home

18% did not - or have not yet - graduated high school

77% are not married

9% are disabled

Percentages based on 802 completed surveys