

TO: Workforce Investment Board

DATE: 3/11/04

FROM: WIB Staff

For Action

For Information

For Discussion

SUBJECT: Volunteer Income Tax Assistance Program

PROPOSED MOTION(S): Information Only

DISCUSSION: This is the second year the Volunteer Income Tax Assistance (VITA) program in Merced County has operated out of the Worknet Employment Resource Center in Merced.

In 2003 the program began on February 18th, ended April 15th, and operated three (3) evenings per week plus Saturdays during the extended hours at the ERC. In 2003, 169 families were served with \$300,000 generated in income tax refunds. The average dollar amount per family in refunds was \$1,775.15. The Internal Revenue Service provided us with an economic impact multiplier for tax returns for Merced County of 3.5. Therefore the economic impact for Merced County was \$1,050,000.

In 2004 the program is operating only two (2) evenings per week since the ERC is no longer open evening except for this program. The VITA program is run entirely by volunteers, including the training portion of the program. During the first two (2) weeks of the program over 30 income tax returns have been prepared with a total of approximately \$24,000 in refunds and a community impact of approximately \$84,000. A full report of the final results of the program will be presented at the WIB May 13th meeting.

The program is in need of additional volunteers as appointments are booked ahead several weeks. In addition to tax preparers, the program is in need of volunteers to make appointments, screen customers to make sure they have the necessary forms (i.e. W2's, Social Security cards, prior year tax return, etc.) and act as translators. The trainer is available to train additional volunteers. He also works with volunteers to answer questions and provide other assistance as needed. There is a need to provide services to more customers if volunteers can be found. For further information please contact Patric Farrar at 724-2043 or Jackie Walther-Parnell at 724-2012.