



Transitional Assistance Department (TAD)

TAD's VITA/EITC Campaign Brings in \$22 Million to the Community

HS Connection Staff

The Transitional Assistance Department (TAD) exceeded its own high expectations when the Volunteer Income Tax Assistance (VITA) program served more than 11,000 taxpayers resulting in more than \$22 million in federal and state refunds and credits for local communities.

TAD launched the Volunteer Income Tax Assistance (VITA)/ Earned Income Tax Credit (EITC) in January 2014. The free income tax preparation services for eligible low-to-moderate income families and individuals throughout the County ensured access to the EITC and other federal and state credits at no cost to the taxpayer(s). The refunds received by these taxpayers are spent in local businesses, thereby stimulating local economic growth and activity, directly in line with Countywide Vision objectives. This project was one of TAD's departmental performance measures linked to the County Goals and Objectives for fiscal year 2013/2014. TAD's goal was to increase the number of eligible taxpayers served by 3 percent over those served in fiscal year 2012/2013.

Tax season can be very stressful for low-income taxpayers, especially when the average cost of preparing a tax return is more than \$230 nationally, and costs even more in California. By partnering with the IRS, TAD provides free, IRS-certified, quality tax preparation services to all eligible taxpayers in local communities. This effort keeps more of the taxpayers' refund dollars in their pockets to spend on basic needs, something special, or save for that rainy day.

Due to a vigorous marketing campaign, partnerships and coordination with the Internal Revenue Service (IRS), other County departments and local community agencies, TAD, exceeded its project goals and served more than 11,362 taxpayers countywide.

"Overall, the TAD VITA program saw an increase of more than 47 percent in the number of taxpayers we were able to assist this tax season," said TAD Director Nancy Swanson. "I believe the outstanding customer service we delivered to the taxpayers in our County is one of the biggest reasons for our continued success."

Much of the program's success is attributed to the Work Experience (WEX) program. TAD provides WEX workers with basic job skills and IRS tax law training and certification prior to the tax season to perform tax preparation. The VITA program improves the WEX workers' job skills, interviewing techniques, and ability to compete in the job market once the tax season has ended.





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Elizabeth Lepe, Assistant to Director

Measurements	2014 Results	% Increase 2013 vs. 2014
Number of federal/state returns filed:	11,362	47.2%
Total federal refund \$:	\$ 20,831,717	40%
Total state refund \$:	\$ 1,171,231	46.1%
Amount of EITC claimed \$: (included in federal refund total)	\$ 10,372,816	39.1%
Estimated local economic activity \$ due to EITC:	\$ 15,559,224	39.2%

“The WEX participants gain lifelong skills they can take with them anywhere in life thanks to this valuable program and training,” said VITA Program Manager Elizabeth Lepe. “The WEX participants continue to pass on the knowledge they’ve gained and job skills learned well after tax season is over.”

The community response was positive.

“I am so grateful for this service and so pleased that everyone at TAD were so professional and helpful... I never knew having your taxes prepared would be such a great experience,” wrote a TAD customer. “I will definitely recommend this service to all my friends and be back next tax season.”

