

THE VIRTUAL VITA PROJECT

Presented by:

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IRS Certified Volunteers Providing

FREE TAX PREPARATION

VirtualVITA
Serving CT Families

Presented to:





Virtual VITA – Background on Volunteer
Income Tax Assistance Program in CT

THE VOLUNTEER INCOME TAX ASSISTANCE PROGRAM IS THE SINGLE MOST CRITICAL ANTI-POVERTY TOOL IN CONNECTICUT

Tax Credits & Refunds

- Earned Income (up to \$6,000 per family)
- Child Care (up to \$2,000 per child)
- Educational (up to \$2,500 per student)
- CT State Earned Income (up to \$1,200)

Economic Impact Payments (stimulus)

- \$1,200 per individual
- \$500 per qualifying child
- Part of the CARES ACT Initiative

Elimination of professional tax return preparation fees

- \$300 per return
- Providing unbanked and underbanked with free bank accounts

Self – Employed Pandemic Unemployment Assistance

- \$15,000-\$20,000 in benefits for qualified self-employed individuals (CARES ACT)

THE EARNED INCOME CREDIT (EITC)

THE ANCHOR IN THE FIGHT AGAINST POVERTY IN CONNECTICUT

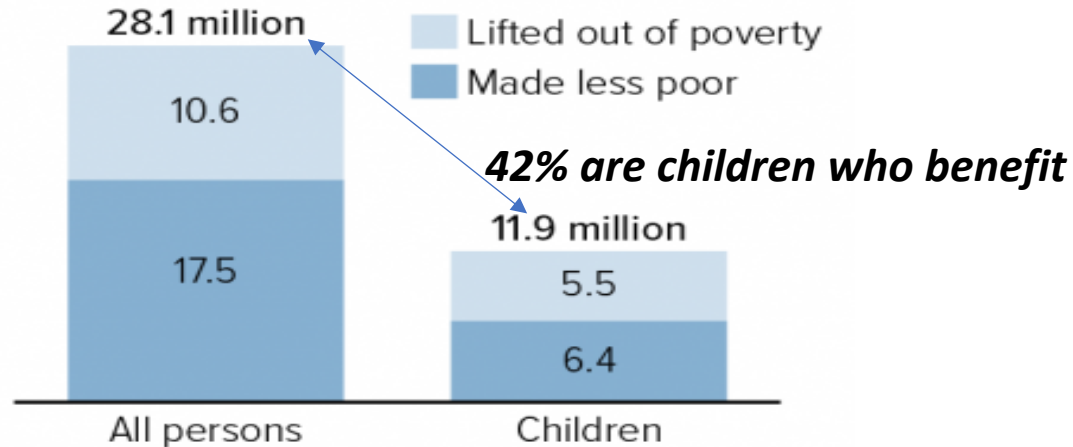
Earned Income Credit Metrics	Connecticut	Nationwide
Total EITC Returns in CT filed by Household	213,000	25 million
EITC Refund Dollars in CT	\$475,000,000	\$63 Billion
Average Federal & State EITC Refund in CT	\$2,737	\$2,488
VITA Client AGI in CT	\$24,542	\$25,043
Unclaimed EITC Percentage in CT	21.4%	20%
Unclaimed EITC Dollars in CT	\$76,764,000	\$10.5 Billion

Source – Prosperity Now Taxpayer Opportunity Network

THE EARNED INCOME CREDIT AND CHILD TAX CREDIT POVERTY UPLIFT NATIONWIDE

Earned Income Tax Credit and Child Tax Credit Have Powerful Anti-Poverty Impact

Millions of people lifted out of poverty or made less poor by EITC and Child Tax Credit, 2018



Note: These figures use the Supplemental Poverty Measure. Unlike the Census Bureau's official poverty measure, the SPM counts the effect of non-cash government programs like housing and food assistance, and tax credits.

Source: CBPP analysis of Census Bureau March 2019 Current Population Survey

CENTER ON BUDGET AND POLICY PRIORITIES | CBPP.ORG

During the 2017 tax year, the average EITC was \$3,191 for a family with children (boosting wages by about \$266 a month).

VIRTUAL VITA'S TARGET – 42% OF CT POPULATION

ALICE - ASSET LIMITED INCOME CONSTRAINED EMPLOYED
357,000 HOUSEHOLDS – 27% OF CT POPULATION



BELOW THE FEDERAL POVERTY LINE
157,000 HOUSEHOLDS - 11% OF CT POPULATION



UNDOCUMENTED IMMIGRANTS IN CT
65,000 HOUSEHOLDS - 4% OF CT POPULATION



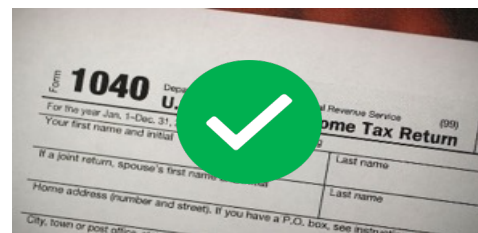
VIRTUAL VITA'S CT TARGET POPULATION
579,000 HOUSEHOLDS – 42% OF CT POPULATION

Source – United Way/American Immigration Council

HOW THE VOLUNTEER INCOME TAX ASSISTANCE PROGRAM HISTORICALLY DELIVERED ITS CRITICAL MISSION IN CT

- Over **700 IRS Trained Certified Volunteer Preparers** throughout CT provide free income tax preparation.
- Close to **60 CT brick and mortar sites**
- Annually prepare **over 18,000 returns and deliver \$28 million in refunds** to our Target population.
- We **save our community close to \$6 million in tax preparation fees.**

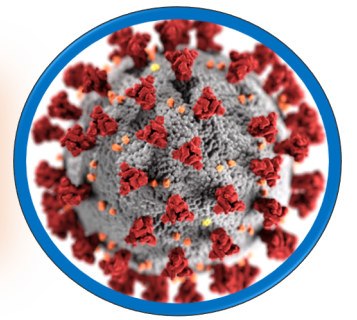
A TRUE GRASSROOTS EFFORT!





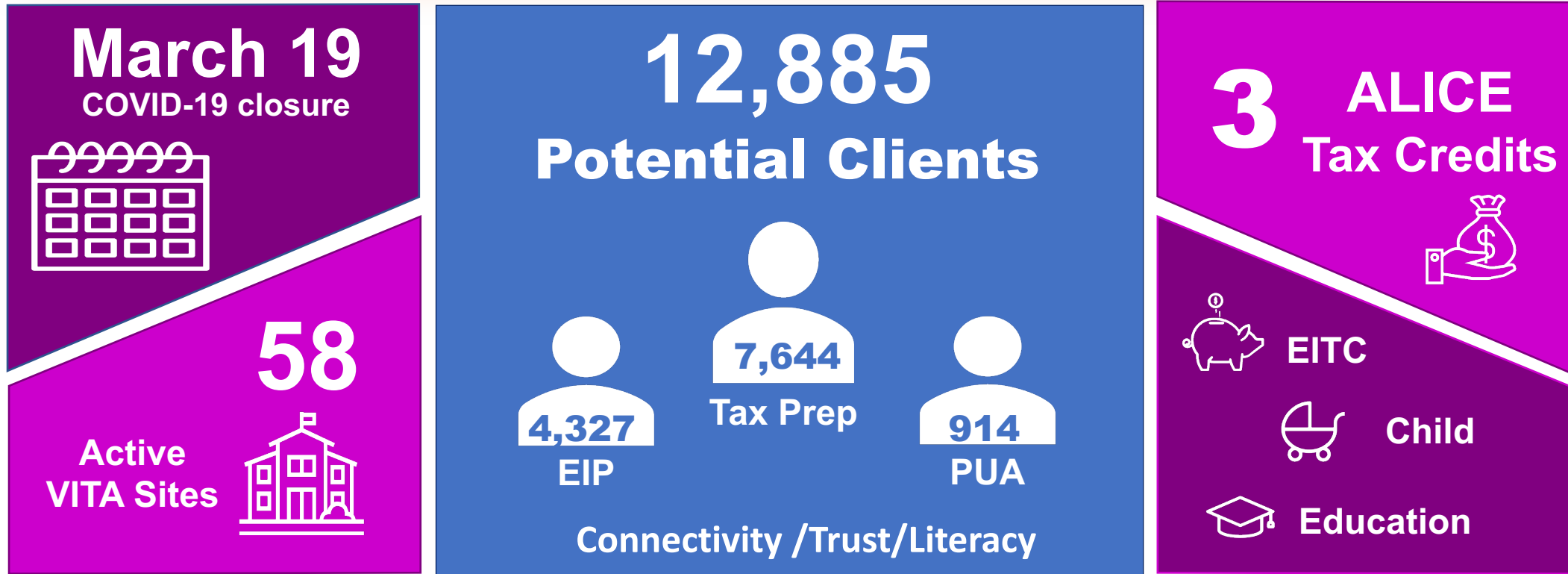
Virtual VITA – An Immediate Mission
Born Out of Crisis and Challenge

COVID-19 CHALLENGES IN CT - WHAT WE KNEW*



- Over **7,500 of 18,000** clients needed to file when brick & mortar closed on March 19th.
- **Anxiety and fear** drove the balance of our client base underground.
- Unclaimed refunds of **close to \$200 million** among 80K+ households .
- 90,000 of **severely impoverished families** needed to file to receive their Stimulus.

Virtual VITA – Our Team Mobilized Mapped & Focused the Challenge



Partners  **4-CT | Social Venture Partners**
VirtualVITA, Inc | iMission Institute

Our Success was due to the Collaborative Grassroots effort between the following partners:

4-CT

- Project funding of \$115K/Strategic advice
- Promoted our Program and received Governor Lamont's endorsement

Social Venture Partners

- Strategic advice
- Operational non-profit guidance
- Provided Dept of Social Service Credentials

Virtual VITA, Inc

- Development of Secure encrypted JotForm tool
- Training of 10 virtual VITA teams
- Tax instruction to outreach team
- Countless hours of tax return preparation

iMission Institute

- Marketing guidance
- Facilitated donation of Salesforce.com
- Setup and training of ThruText peer-2-peer text messaging platform

What Virtual VITA Did To Meet the Challenge

Direct outreach to unserved 2018 VITA families and individuals to offer them a simple to use “virtual” and secure app to complete their 2019 tax returns w/o COVID-19 risk

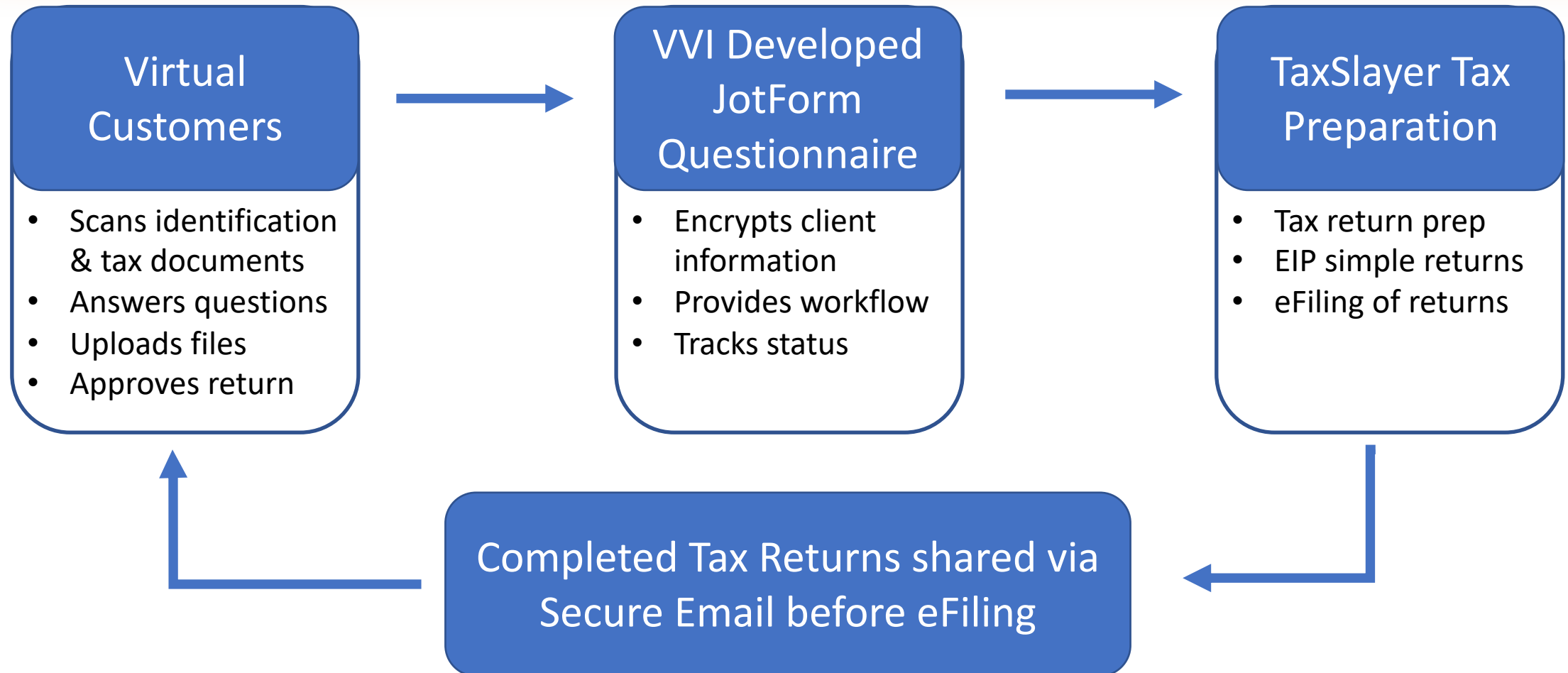


Mobilization Activities delivered within 4 weeks



- Developed Secure Encrypted Portal
- IRS approval of all applications & methods within one week of testing.
- Trained & Consolidated 58 sites into 10 Virtual sites with over 200 Volunteers preparing returns Safely from home.
- Hired a project manager and team of marketing specialists for state-wide outreach.
- Developed the online tools to contact and track our client interactions.
- Developed peer-2-peer marketing campaigns to engage clients and build trust.

Virtual VITA volunteers developed easy to use secure online IRS approved tools and methods to prepare tax returns





Virtual VITA – Accomplishments, Metrics & Outcomes

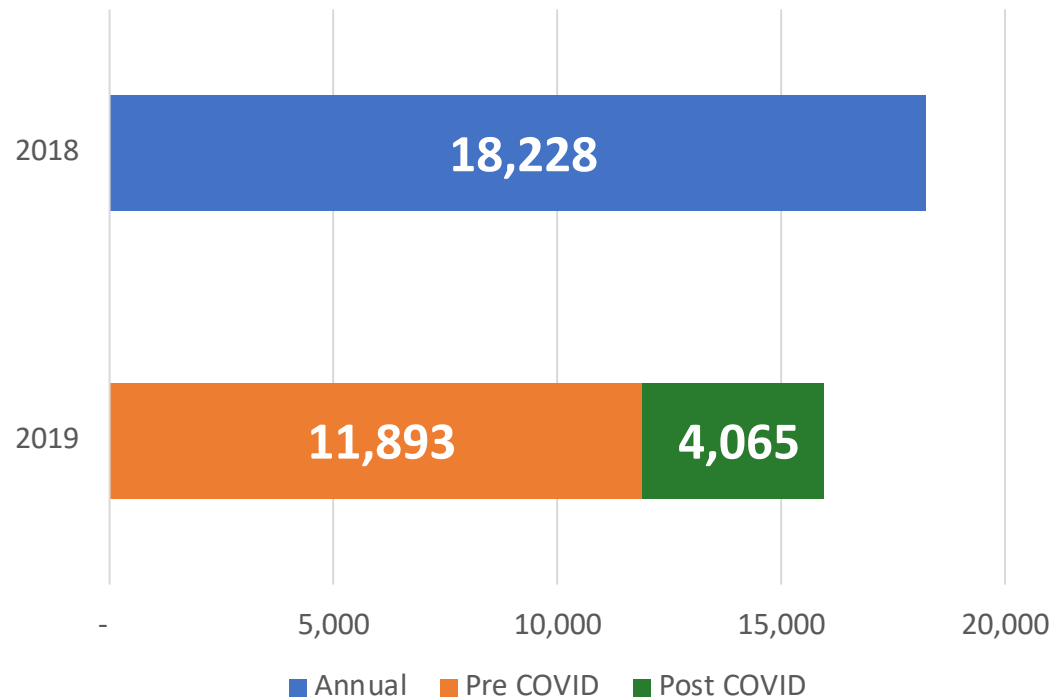
VIRTUAL OUTCOMES ACHIEVED

<p>4,065 2019 Tax Returns</p> 	<p>Community Benefits \$11.044m 9,604% delivered to clients ROI</p>	<p> 10 Virtual VITA Sites</p>
<p> 87.5% of 2018 Tax Return Volume</p>	<p> \$10.367m Tax Returns \$239k \$910k EIP PUA</p>	<p> 4-CT's #1 ROI Project</p>
<p>7,000+ Volunteer Hours 100+ Volunteers across CT</p>		

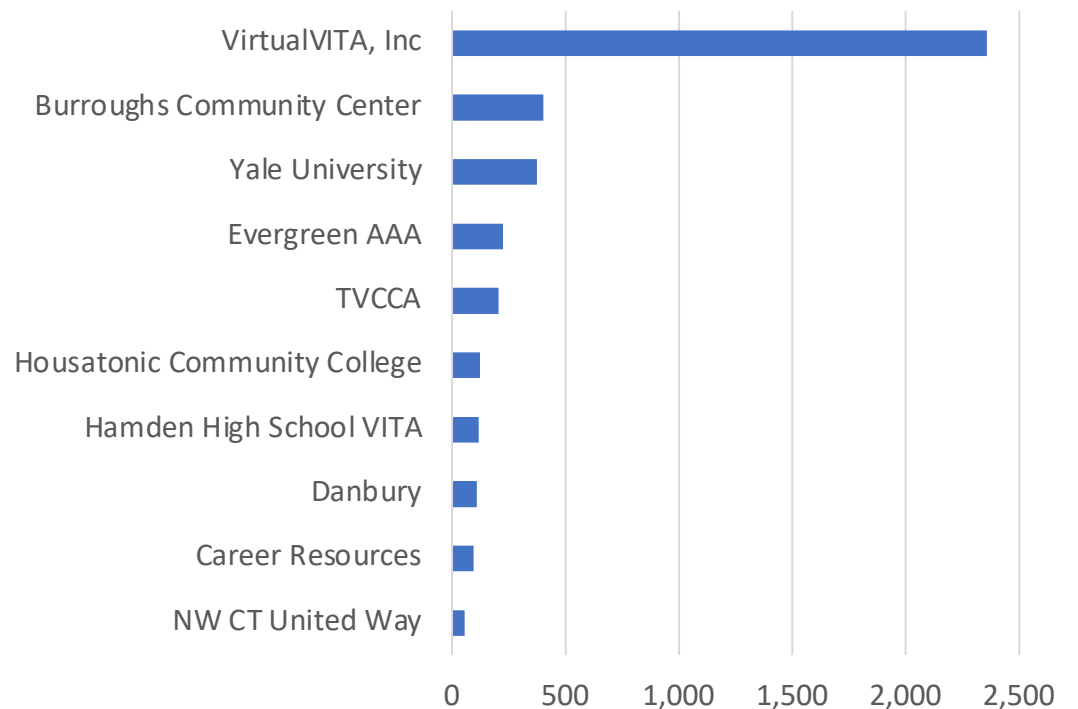
 **Endorsed by Governor Lamont and CT Department of Social Services**

By the end of the 2019 tax season, the CT VITA Coalition was able to complete 87.5% of 2018's tax return volume

CT Coalition Tax Returns Prepared



Post COVID-19 Tax Returns



100+ VITA volunteers donated 7,000+ hours of time



Virtual VITA – Positive Client Experience

AT-RISK CLIENTS FOUND THE VIRTUAL VITA APP EASY TO USE

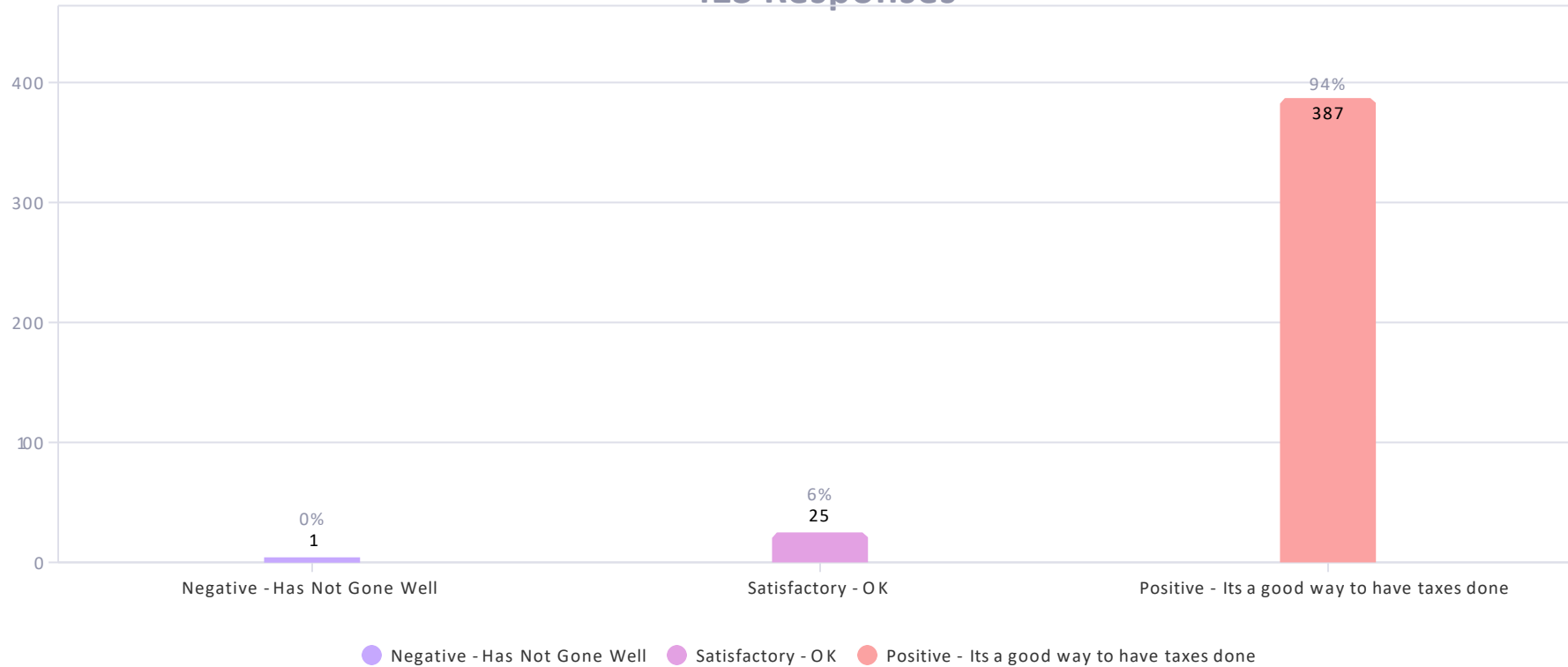
- **Majority of Low-Income Clients have subsidized cell phones – (Obama phones).**
- **Respond quicker to text if from a Trusted source.**
- **Convenience of a site that's open 24/7.**
- **Turnaround time from submission is fast and accurate - between 24 & 48 hours.**
- **Older population is able to navigate our Virtual App.**

THE RESULTS FROM OUR SURVEY SPEAK FOR ITSELF

94% Positive Client Experience

What was your overall experience with Virtual VITA?

413 Responses





Virtual VITA – Our Mission Forward and our
National Partnership with Code for America

Our Virtual Solution is Proven and Ready to meet the Challenges of 2021 and Beyond

Virtual VITA's 2021 and Beyond Mission

Virtual VITA's mission:

- Close CT's Great Economic Divide by providing safe secure digital solutions to the State's At-Risk Population which is over 40%.
- Help CT's At-Risk Households get the tax refunds and other credits they deserve.
- We strive to develop value-added financial, career and educational services emanating from a household's tax biography to build a complete socio-economic single point of entry benefits ecosystem.

Our Virtual Solution is Proven and Ready to meet the Challenges of 2021 and Beyond

Code for America – IRS Nationally Approved Get Your Refund Program

For our work at the State Level and Nationally through the Code for America EIP Stimulus Program, we have been named **by Code for America to Lead the CT State Coalition Virtual VITA Program for 2021.**

- Over 9 weeks from August 25th to October 31st VirtualVITA Prepared Nationally over 3,000 Economic Stimulus Returns delivering over \$3.6 million in refunds across the country.

CODE *for*
AMERICA

VirtualVITA

VirtualVITA – Connect with us so that we can help our community

Email us at:

LFFVITA@gmail.com or PatJGentile@gmail.com

OR

Visit our Website at www.virtualvita.org

Thank You!