

California/Nevada Community Action Partnership
in conjunction with
State of CA Community Services and Development

presents

EITC/VITA Webinar Series

Webinar 4: VITA Funding, Sustainability, and Partnerships



California / Nevada Community
Action Partnership



Webinar Facilitator

Frank Ruiz

Assistant Director of Community Initiatives
Community Services & Employment Training, Inc.

- * Works for the Community Action Agency of Tulare County
- * Established VITA Program in Tax Year 2005
- * Operates 4 VITA sites in Tulare County
- * Participates in the United Way of Fresno County EITC/VITA Coalition, Southern San Joaquin Valley Asset Building Coalition, and California EITC & Asset Building Coalition

Purpose of EITC/VITA Webinar Series

- * Encourage and equip community-based organizations to get involved in EITC Outreach and start VITA Sites
- * Share best practices in EITC Outreach and VITA operations
- * Provide resources to start new and grow existing VITA programs and coalitions

Webinar Objectives

- * Identify funding sources to support VITA
- * Discover valuable community resources that can support your program through in-kind commitments
- * Discuss how program standardization can help train new staff and replicate your program in the future
- * Identify best practices for starting a VITA coalition
- * Discover how coalitions can help you increase capacity and leverage resources

Guest Presenters

- * IRS VITA Grant

- * Iliana Macagno, Senior Stakeholder Relationship Tax Consultant, IRS SPEC Fresno Office

- * Other Sources of Funding

- * Carmen Bernal, Vice President of Community Impact, United Way of Kern County

- * In-kind Contributions

- * May Gnia Herr, Interim Vice President of Community Impact, United Way of Fresno County

- * Developing a VITA Coalition

- * Aaron Murphy, Asset Building Manager, Community Action Agency of Butte County, Inc.

Alphabet Soup

- * EITC: Earned Income Tax Credit, also abbreviated EIC
- * VITA: Volunteer Income Tax Assistance Program
- * TCE: Tax Counseling for the Elderly
- * IRS SPEC: IRS division responsible for overseeing EITC and VITA coalitions
- * Cal/Neva: California/Nevada Community Action Partnership
- * ITIN: Individual Taxpayer Identification Number

Typical VITA Program Expenses

- * Site Coordinators
- * Food & Refreshments
- * Supplies: paper, ink, files, staples
- * Equipment: computers, printers, copiers, projectors
- * Facility Costs
- * Marketing
- * Information hotline

Funding: IRS VITA Grant

- * Eligible Applicants
- * Eligible Uses of Funds
- * Ineligible Uses of Funds
- * Match Requirements
- * Typical Grant Amounts
- * Various Program Models
- * Competitiveness Factors

Web: <http://www.irs.gov/individuals/article/0,,id=184243,00.html>

Email: grant.program.office@irs.gov

Phone: 404-338-7894

Funding: Other Sources

- * Financial Institutions
- * Foundations
- * Local Businesses
- * United Ways
- * Local Government
- * In-kind Contributions

In-Kind Contributions

- * Facilities
- * Equipment
- * Office Supplies
- * Program Marketing
- * Complementary Services
- * Volunteer Site Coordinators

Group Discussion Question

What unique partnerships have you developed to access vital funding or resources for your program?

Sustainability

- * Program Standardization
 - * Training: volunteer and site coordinators
 - * Marketing: flyers, press releases, talking points
 - * Work flow
- * Agency Staff
- * Volunteers
- * Incorporating VITA Services into Related Programs

Group Discussion Questions

- * What have you done to make your program easier to replicate every year?
- * Do you have a plan to continue VITA if your agency lost one of its major funding sources?

Coalition Building

- * Make a game plan
 - * What are your goals? What strategies will you use to attain those goals? Who is going to help you get there?
- * 1st informal meeting
 - * Potential guest list should be extensive
 - * Provide information only, get feedback, and at the end ask for 3-5 volunteers to form a “planning” committee
- * 2nd meeting provides direction
 - * Provide suggestions of planning group to seek “buy-in” from others. Once “buy-in” is established form committees

Coalition Building

- * Committee Leadership

- * As the facilitator be a part of each committee formed but act as a partner, not the leader

- * Ask for volunteers to chair committees

- * We have 4 committees: Steering, Financial Education, VITA, and Marketing

- * If committees are set up correctly, they take a life of their own and allow you as the facilitator to be in a support role rather than leadership role

Direct Coalition Building Questions

- * How do we get the support of partner agencies to start or provides VITA services?
- * At what point do we go from meeting 1-on-1 with partners to holding coalition meetings?
- * What are the initial areas in which partners collaborate? Have we identified future areas of collaboration?
- * How do we coordinate the efforts of partner agencies in areas of: Planning, Marketing, and Service Delivery?
- * How do you coordinate the work of agencies that normally compete with one another for funding or clients?

List of CA VITA Coalitions with IRS SPEC Contacts

TERRITORY: SACRAMENTO, CA	OFFICE ADDRESS: 4330 Watt Avenue, SA 5650 Sacramento, CA 95821	TM: Vacant	
Asset Building Coalition of Butte County	Doug DeSoto, Housing Authority of the County of Butte (HACB)	douglasd@butte-housing.com	(530) 895-4474
Community Partnership for Families of San Joaquin	Lao Ly, CPFSJ	lly@cpfsj.org	(209) 444-4111
Sacramento Coalition for Working Families	Stacy Hart/SCWF	shart@communitycouncil.org	(916) 447-7063
United Way of Fresno County	May Gnia Vang at United Way	mvang@unitedwayfresno.org	(559) 244-5710
United Way of Kern County	Carmen Bernal, United Way of Kern	Carmen.B@uwkern.org	(661) 834-1790
Yolo County VITA Coalition	Erica Rodriguez, Office of Assemblymember Mariko Yamada	erica.rodriguez@asm.ca.gov	(707) 455-8025
TERRITORY: SAN DIEGO, CA	OFFICE ADDRESS: 1 Civic Center Drive, Ste. 400 San Marcos, CA 92069	TM: Barbara Kuhns barbara.m.kuhns@irs.gov	760-736-7340
Community Action Partnership of San Bernardino	Carolyn Debevec, Community Action Partnership of San Bernardino	cdebevec@capsbc.sbcounty.gov	(909) 723-1574
County of San Bernardino Transitional Assist Dept	C.J. Houston, Regional Manager, San Bernardino County TAD	chouston@hss.sbcounty.gov	(909) 252-4859
Irvine EITC Collaborative	Lisa Henson, City of Irvine	lhenson@cityofirvine.org	(949) 481-4221
Orange County Financial Stability Alliance	Natalie Bishop, United Way of Orange County and Jeanette Valencia, Legal Aid Society of Orange County	NatalieB@UnitedWayOC.org Jvalencia@LEGAL-AID.com	(949) 263-6127 (714) 571-5269
San Diego Countywide EITC Coalition	Yolanda Valdez, County of San Diego Health & Human Services; Shaina Gross, United Way of San Diego County	Yolanda.Valdez@sdcounty.ca.gov Sgross@uwsd.org	(619) 338-2872 (858) 636-4181
TERRITORY: LOS ANGELES, CA	OFFICE ADDRESS: 300 North Los Angeles St., MS 6602 Los Angeles, CA 90012	TM: Connie Stewart connie.stewart@irs.gov	213-576-3439
AIM Coalition	Kathy Dixon, AIM-IRS Organization	k.dixon1996@hotmail.com	(818) 298-9147
California Central Coast Tax Coalition	Eddy Quijano, Cal Poly	equijano@calpoly.edu	(805) 756-1369
Greater Los Angeles EITC Campaign Partnership	Christine Marge, United Way of Greater Los Angeles	cmarge@unitedwayla.org	(213) 808-6527
Ventura County Financial Empowerment Partnership	Susan Englund, United Way of Ventura County	senglund@vcunitedway.org	(805) 485-6288 x 226
TERRITORY: OAKLAND, CA	OFFICE ADDRESS: 1301 Clay Street, 1520S Oakland, CA 94612	TM: Stella Lee stella.lee@irs.gov	510-637-2460
Alameda County Earn It! Keep It! Save It!	Vanessa Muniz/ United Way of the Bay Area	vmuniz@uwba.org	(510) 238-2424
Earn It! Keep It! Save It! Contra Costa County	Vanessa Muniz/ United Way of the Bay Area	vmuniz@uwba.org	(510) 238-2424
Earn It! Keep It! Save It! Marin	Kelly Batson, United Way of the Bay Area	kbatson@uwba.org	(510) 238-2415
Earn It! Keep It! Save It! Napa County	Vanessa Muniz/ United Way of the Bay Area	vmuniz@uwba.org	(510) 238-2424
Earn It! Keep It! Save It! Santa Clara County	Patrick Soricone, United Way Silicon Valley	patrick.soricone@uwsv.org	(408) 345-4337
Earn It! Keep It! Save It! San Francisco	Louise Carroll, Tax-Aid	kkoberna@kpmg.com	(415) 963-8911
Earn It! Keep It! Save It! San Mateo	Louise Carroll, Tax-Aid	kkoberna@kpmg.com	(415) 963-8911
Earn It! Keep It! Save It! Solano	Rhonda Smith, Children's Network of Solano County	rsmith@childnet.org	(707) 421-7229
Monterey Consortium	Yuri Anderson	Yanderson@unitedwaymcca.org	(831)372-8028
Redwoods Incentive Community Help for Economic Security	Bill Rodstrom - Redwood Community Action Agency	planning@rcaa.org	(707) 269-2021
Santa Cruz Collaborative	Ellen Murtha, Santa Cruz Community Credit Union	emurtha@scruzccu.org	(831) 460-2345
United Way of the Wine Country	Darlene Fiscus - United Way of the Wine Country	darlene@unitedwaywinecountry.org	(707)528-4485 x108

Impact of VITA Coalitions

- * Serve more taxpayers
- * Access more community resources
- * Increase capacity to implement VITA Program
 - * Volunteer recruiting, training, marketing,
- * Access new funding sources
- * Increase visibility in the community
- * Develop new working relationships
- * Share responsibilities for community campaign

Group Discussion Question

What is the greatest impact that your coalition has had on your VITA program?

Next Steps to Start a EITC/VITA Program

- * Contact your local IRS SPEC officer
 - * Get information about the local need
 - * Find out what organizations are providing free tax services in your community
 - * Develop a strategy to reach out to other agencies
- * Contact a local EITC/VITA coalition
 - * Identify the unmet need in the community
 - * Identify additional opportunities to collaborate

Additional Resources

- * Cal/Neva Earned Income Tax Credit Resource Guide

<http://www.cal-neva.org/programs/documents/EITCManualEd3Final.pdf>

- * IRS VITA Website

<http://www.irs.gov/individuals/article/0,,id=107626,00.html>

- * Earn It! Keep It! Save It! Website

<http://www.earnitkeepitsaveit.org/>

Upcoming Symposium

- * California EITC & Asset Building Coalition Annual Symposium
 - * Tuesday, November 15 @ Burbank Airport Marriott
 - * Only \$59 per person
 - * Space is limited!
 - * REGISTER at calneva.camp7.org



Community Action
FULFILLING the PROMISE



California / Nevada Community
Action Partnership

THANK YOU



- * Cal/Neva is proud to work in partnership with the CA Department of Community Services and Development (CSD) to bring you this EITC/VITA Webinar Series
- * For more information go to:
 - * Cal/Neva ~ cal-neva.org
 - * CSD ~ csd.ca.gov

