



UNITED WAY OF NEW YORK STATE NEW YORK MAKES WORK PAY

2010 TAX SEASON RESULTS

Free tax preparation was the predominant, although not the only, asset development strategy implemented by the six funded communities. Asset summit outcomes and the ongoing work of the disability committees that were formed or enhanced as a result have prompted other asset development offerings and continued planning and development to expand this work.

Achieving a 10% increase in asset development services accessed by persons with a disability:

The final deliverable for the 2009 NYMWP asset development grants was demonstration of a 10% increase in persons with a disability accessing local asset development strategies. The one that all six funded coalitions were able to report on was EITC and VITA, where they collectively reported that 25% of their VITA clients (or slightly more than 6,200 people) had a disability or a family member with a disability. Some communities demonstrated slight or moderate increases while others clearly documented the results that can be achieved when strategically focusing on a particular population.

- Allegany County documented a 308% increase in VITA clients with disabilities served.
- Buffalo's increase for this population was 112%.
- The Greater Capital Region (Albany) reported a 33% increase overall and 25% increase at the three disability organizations hosting Ad Hoc VITA days.
- Utica saw a 14% increase.
- Tompkins County did not report an increase, but held steady at 17% of their clients having a disability.
- Rochester reported only numbers served and the % of that total who reported having a disability (19%). How that changed from 2009 is not known.

For Rochester's EITC and the other asset development services that were provided, these communities now have a baseline against which to measure future growth.

Other asset development activities offered

The offerings varied widely, depending on the asset summit results and strategies already in place. Buffalo and the Greater Capital Region already had well developed and functioning disability committees; Rochester has been offering savings bonds at tax time since 2009; and RCIL has spearheaded the Mohawk Valley Asset Building Coalition (Utica area) since its inception in 2005. A review of what has been or is currently being offered includes:

- Eight presentations on free tax preparation, financial education and IDAs, presented by Buffalo CASH and their disability partners, targeted to persons with a disability, for 215 participants.
- Four new IDA accountholders with disabilities in Buffalo.
- Financial fairs, financial education workshops, bank account openings at VITA sites, lunch and learn session on EITC and other tax credits were offered by CASH of the Capital Region. The coalition's 80 partners offer workshops and training programs through out the year.
- Benefits Advisement Training with a focus on Plans for Achieving Self Support for individuals receiving SSI or SSDI is being offered at various locations in Allegany County. Seven sessions are scheduled from May 28 - November 17. Training times coincide with the bus schedule to facilitate participation.
- Disability Awareness Training has been provided in Utica and Tompkins County for VITA volunteers, 2-1-1 call takers and United Way staff.
- In Rochester 63 VITA clients with disabilities used a portion of their tax refunds to purchase savings bonds; 1126 used direct deposit for their refunds and 52 of those used a CFR prepaid card.

Lessons learned

Grantees commented on specifics of their outreach and direct services provision as well as coalition building, noting:

- Broader coalitions achieve bigger results, create better opportunities and expand the pool of volunteers.
- Mobile tax preparation teams expanded the ability to offer ad hoc VITA sites at disability organizations.
- Volunteer recruitment and training needs to be done early and training needs to be enhanced so they are better able to address the specific situations that affect persons with disabilities.
- 2-1-1 works – making it easier for individuals to find and schedule appointments at local VITA sites.
- Having the Asset Committee and Disability Initiative Committee working together produced positive results, for example creating a Money Menu and implementing Financial Forums in the Greater Capital Region.
- The surveys required of the various CASH funders were a challenge for individuals with lower literacy and/or cognitive functioning and took a lot of time for VITA volunteers to read and explain each survey question.
- Disability organizations have a wide array of staff that may be responsible for completing tax returns for their program participants and need to be included in this work.
- VITA sites need more information on area disability supports and services.
- Expanded marketing will only help if capacity exists to meet the increased demand.
- Volunteer diversity is necessary and will help insure consistency and increase the number of individuals served.
- Disability services organizations are interested in partnering with CASH; even serving as VITA sites. These should be identified early in order to properly train staff and volunteers and to ensure that appropriate practices and procedures are in place.

- Must pay attention to local capacity – dedicated staff and organizational leadership are key to continued progress.
- Self-reported client data may be less than reliable.
- Workers with a disability do not always identify/consider themselves to be a person with a disability.

A look ahead

The funded communities viewed their 2009 efforts and 2010 tax season results as starting points for further expansion and refinement. Plans for continuing and enhancing this work include further expanding local coalitions and disability subcommittees; increasing the number of volunteers; expanding their asset offerings; continuing to provide training; seeking additional funding; and increasing VITA results.

UWNYS conclusions

It is evident from this initial work that existing systems can be effectively modified or enhanced so that specific populations can be served and the ideal of integration can be realized. It is not easy work and needs continuous evaluation and adjustment. Attention must also be paid to local capacity (committed partners, adequate resources, strong coalitions, etc.) to effectively manage this work and continue making progress. Data collection and evaluation tools vary widely among communities and funders – assistance in developing an evaluation tool for these pilot communities to use would be of great benefit. An easier process for communities to share resources, sample materials, marketing strategies and other tools is also needed.