



Innovative use of Technology for VITA



Free Tax Program

- Since program inception in 2002, we have filed tax returns for more than 600,000 low-income New Yorkers, and secured over \$1 Billion in tax refunds for our clients.
- We were able to reach these numbers assisting filers through:
 - Traditional VITA
 - FSA-Facilitated Self Assisted
 - Virtual VITA

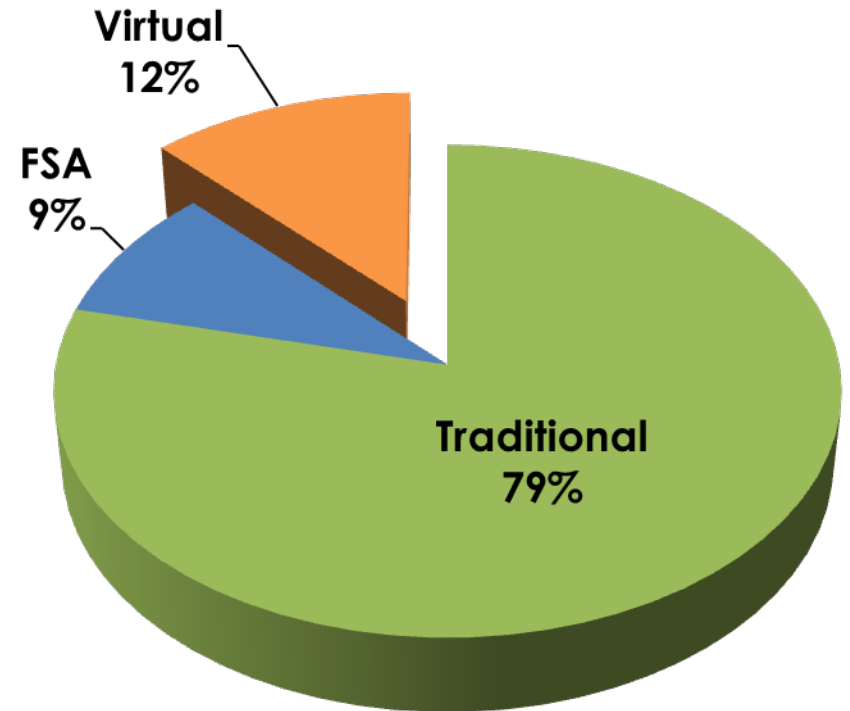


Program Platforms

Traditional VITA - 72,565

FSA-Facilitated Self Assisted - 8,247

Virtual VITA - 11,343



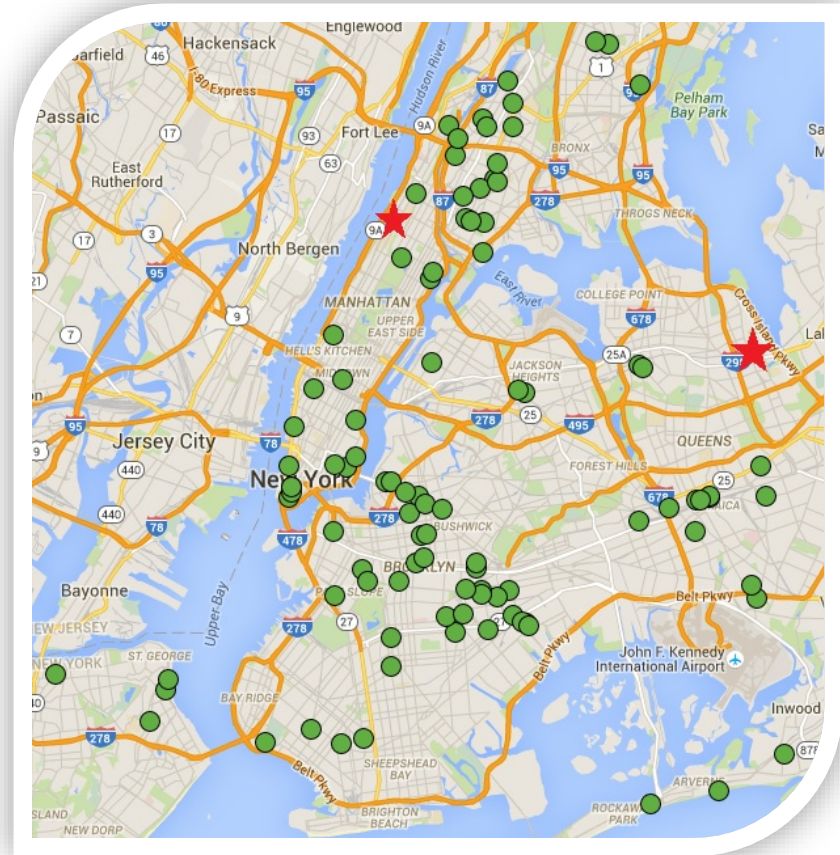
FSA Program

- **What:**
 - Self Preparation, coaching, platforms
- **Who:**
 - Computer savvy
 - mostly younger, Facebook, mobile phone app user
- **Where:**
 - VITA sites (Large waiting time) *triage the line
 - Libraries, Community Colleges, Schools,
 - Creative Partnerships like work force development programs with computer labs
- **How:**
 - Data (all cumulative) * suggestion use entry portal we use Salesforce
 - Collect information you need before launching them onto platform
 - Secure URL
 - Use home portal (give-aways - magnets, mouse pad etc.)
- **Why:**
 - One coach many returns, one to many, Lower cost use existing resources
 - Empowering , don't give them a fish, teach them how to fish
- ***What are the Challenges**
 - Not everyone is ready to go onto self-assisted
 - Data is limited and connectivity to other programs



Virtual VITA Program

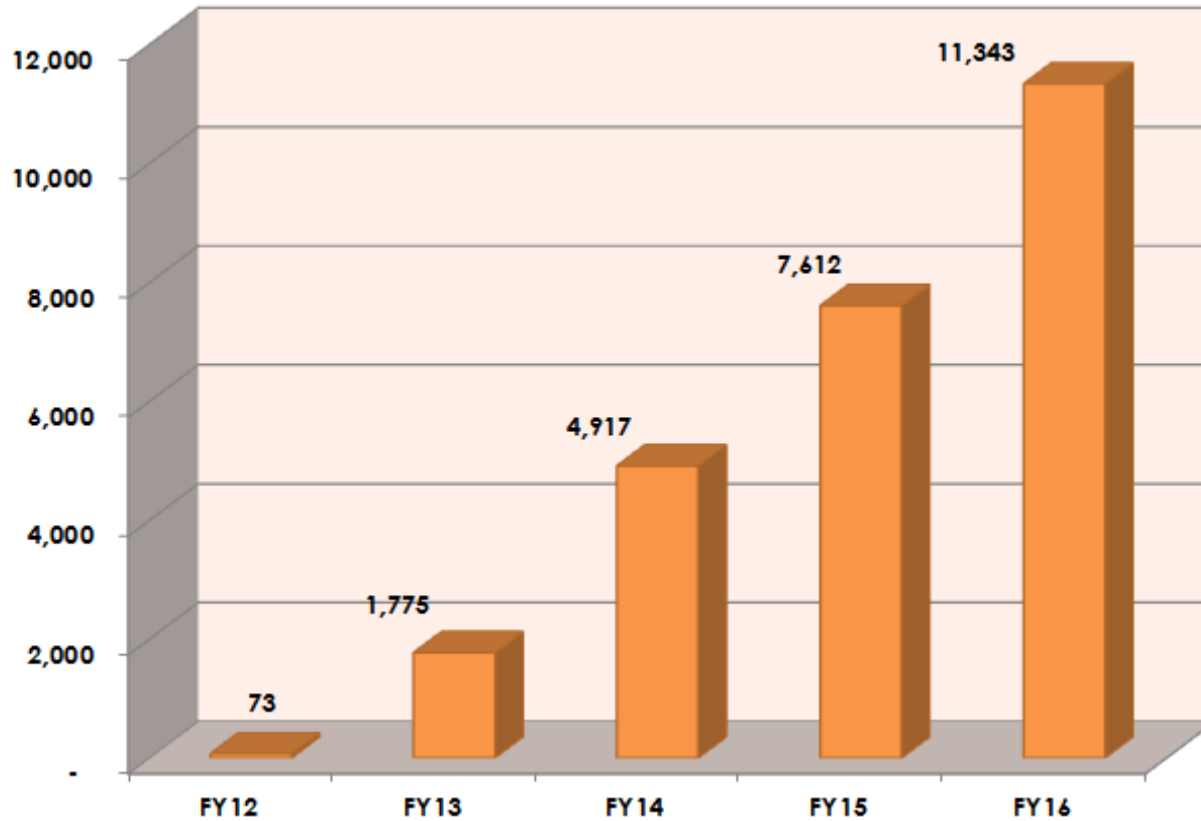
- It's an innovative model within the VITA Program utilizing technology to connect the volunteer and the tax client.
- The clients are not in the same location as the volunteers who actually prepare the returns.
- This is accomplished by separating the intake from preparation site.



2016 Virtual Tax Intake Sites Map



Virtual VITA Growth



■ Tax Returns

Filing Year	Intake Site	Average Return per Site
FY12	2	37
FY13	17	104
FY14	41	120
FY15	120	63
FY16	115	99

VITA Site Usage

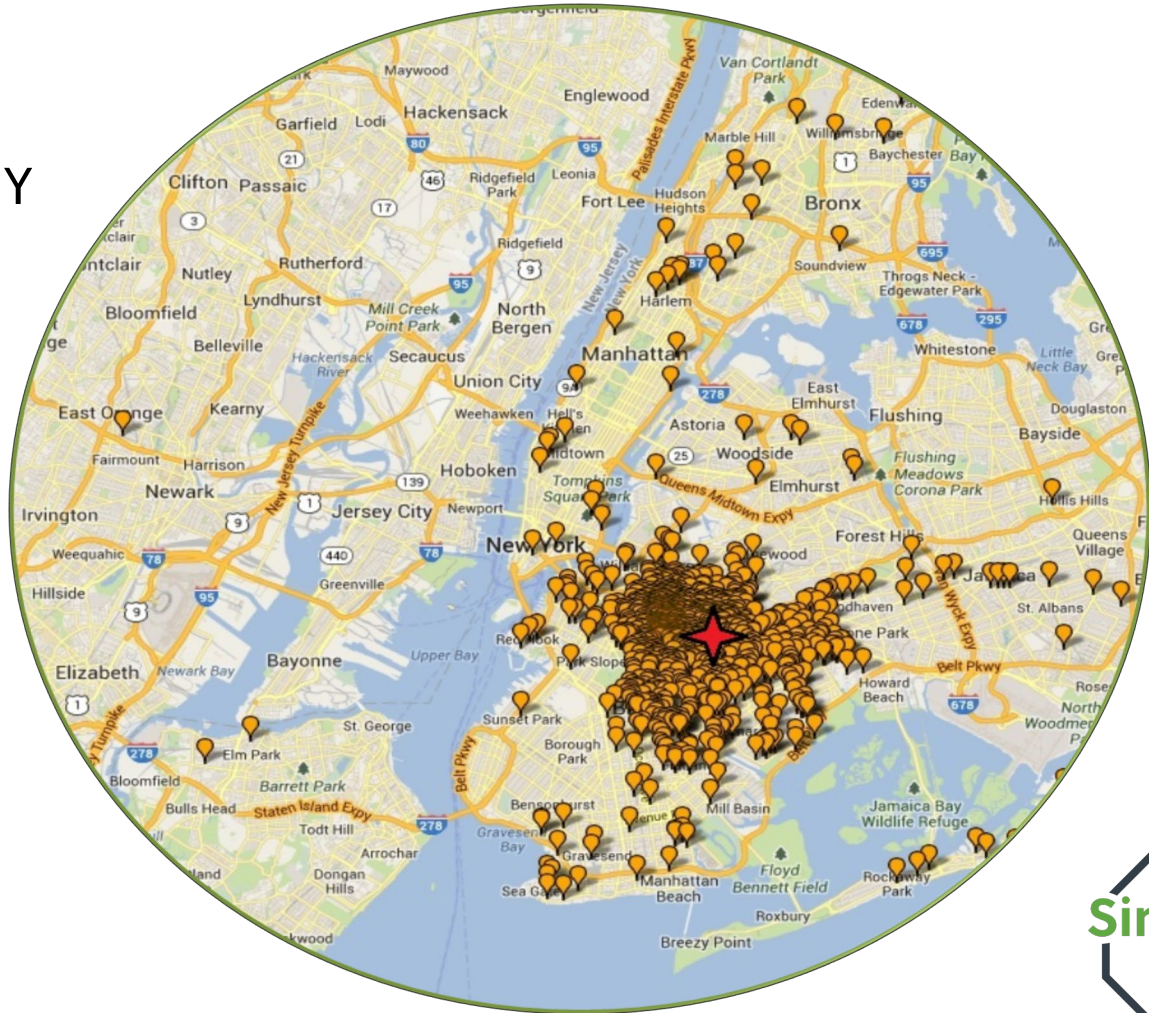
Year: 2013

Site: Bed Stuy

Location: Brooklyn, NY

Volume: 1,881

Impact: Local



Virtual VITA Site Usage

Year: 2013

Site: Virtual VITA

Location: NYC

Volume: 1,775

Impact: City Wide

