

United Way VISTA

Volunteers: Helping Working Families Make Ends Meet

Marie Suvansin 22 April 2015

For nearly a century, United Way of Greater Philadelphia and Southern New Jersey has worked to alleviate poverty in the local community. Through their model of leveraging both nonprofit and for-profit resources, United Way is able to unite the power of multiple stakeholders to address the root causes of poverty and create lasting change. Integral to United Way's model is the mobilization of AmeriCorps VISTA volunteers, whose manpower compensates for the limited staffing faced by many local nonprofits.

With a long and proven track record of success, United Way was well-equipped to help found the Campaign for Working Families in 2003. The campaign's mission then and now is to "seek practical ways to improve the economic status of working people in Philadelphia so that working families have the opportunity to increase their income, widely manage their finance, protect themselves from expensive financial services, and build assets." The campaign ultimately aims to provide working families with the financial resources needed to move up the economic ladder.

The impetus behind the campaign was startling statistics regarding the Earned Income Tax Credit (EITC), a federal financial incentive that reduces the amount of tax owed and provides refunds to low-income working families in the United States. It is widely understood to be the largest federal aid program for the working poor, but in 2011, a Brookings Institution report revealed that 25% of eligible working families were not claiming their credits (Houstoun, 2014). This resulted in 50,000 Philadelphians missing the opportunity to gain as much as \$85 million in income to make ends meet. Since the start of the campaign, United Way has, with the invaluable help of VISTA volunteers, worked to increase the number of Philadelphians who take advantage of the EITC.

Before designing their work, United Way first sought to understand why 50,000 Philadelphians were not taking advantage of the EITC. It was discovered that commercial tax preparers in low-income neighborhoods were charging exorbitant fees, preventing working taxpayers from receiving their full benefits. As Mary Strasser, former vice president of Community Impact, explained, "A lot of people don't know how to prepare their taxes so they end up at commercial tax preparers that act like predators." United Way understood that the EITC could not have a positive economic impact on working class families with tax preparers instead of taxpayers reaping the benefits of the program.

To remedy this issue, United Way recruited volunteer tax

preparers to provide free tax services to low-income families in Philadelphia. Bill England, former director of public engagement, applied United Way's model of leveraging various nonprofits' resources in order to have the greatest impact. England built relationships with companies whose employees were qualified to provide tax preparation. One company, Dechert LLP, even provided time off for staff to volunteer. VISTA volunteers gave presentations to the employees of the partnering companies in order to recruit a cadre of volunteer tax preparers.

The responsibility of the VISTA volunteers was not limited to recruiting other volunteers. They were also tasked with placing volunteer tax preparers at appropriate federal Volunteer Income Tax Assistance (VITA) sites. Operated by the IRS, the VITA sites provide free basic income tax preparation to low-income families, persons with disabilities, the elderly and limited-English speaking taxpayers. VISTA volunteers completed this task by using an enrollment system created by former volunteer Kate Dempsey. The online enrollment system records volunteer tax preparers' availability and skills, and matches them to appropriate VITA sites throughout Philadelphia.

England recalls, "Without the VISTAs, we could not have possibly had the breadth of success in being able to recruit and reach so many people. Their contributions were priceless." At every stage of the campaign, VISTA volunteers were present behind the scenes. Before the

campaign began, in the summer and fall, they were identifying companies to partner with and recruiting volunteer tax preparers. By mid-January, when the campaign officially started, the volunteers had already solidified a cadre of tax preparers and placed them at appropriate VITA sites.

As a result of the VISTA volunteers' efforts, United Way was able to recruit 325 volunteers in the first year of the campaign. These volunteers came from 16 companies and organizations, including the Wharton School of Business, Catholic Social Services and the City Controller's Office. After participating in the rigorous training provided by the IRS, over 210 volunteer tax preparers moved on to work at VITA sites. These volunteers supported a 66% increase in tax returns filed at VITA sites and a 5.2% increase in EITC filers.

Today, United Way is still recruiting and deploying volunteer tax preparers to VITA sites throughout Philadelphia. Through the 2014 tax season efforts, 25,411 low-income families received assistance at VITA sites and collectively gained \$36,575,779 in income. This was a 28% increase in tax returns from the previous season. More hardworking families are receiving the benefits they need to make ends meet.

United Way's EITC program is part of a greater campaign that aims to help working people achieve financial stability. The campaign includes education on savings

products, credit counseling and community workshops on personal finance. Through the different services provided by the campaign, low-income working families can not only make ends meet but also save for the future.

Over a decade later, England is still in awe of the VISTA volunteers: "They come forward to serve their country by providing community service in neighborhoods that really need it. For United Way, they provided not only support through outreach and recruitment. They were also a source of inspiration to those who volunteered. The overall campaign benefited tremendously from having uniquely skilled people who were dedicated to providing services to the community."

Reference

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Author Bio

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