



Orange County United Way



Tax Season 2019 Results

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Orange County United Way’s OC Free Tax Prep

OCUW has 14 years of direct Volunteer Income Tax Assistance (VITA) and Facilitated Self Assistance (FSA) experience and eight years coordinating the delivery of the OC Free Tax Prep coalition (OCFTP) throughout Orange County.

OCFTP, now the largest IRS SPEC partner in Orange County, is a coalition of more than 30 government, institutions and community partners that:

- (1) Offers tax-related education and outreach on topics such as the federal and state EITC and Child Tax Credit;
- (2) Provides free tax preparation for low-income taxpayers, taxpayers with limited English skills, taxpayers with disabilities and new taxpayers via VITA and FSA;
- (3) Encourages saving at tax time.

OCUW hosts and staffs a toll-free tax appointment hotline Monday-Friday, 9am to 4pm, from early January through the tax deadline (typically April 15th), answering over 8,000 calls per tax season to determine program eligibility and make tax preparation appointments for multiple OCFTP locations.

OCUW funds the coalition, leads volunteer recruitment and training, operates several free tax preparation sites, and creates and distributes countywide marketing materials. We also act as the Federal and State EITC outreach liaison for the collaborative, having been a recipient for the last four years of state funding for EITC outreach. OCUW leverages the experience, resources, and outreach capabilities of the countywide campaign to ensure the execution of a successful high-quality, basic, free tax preparation services and serving thousands of taxpayers with financial education. The following details key leadership activities OCUW provides for campaign partners:

- **IRS Required Administration:** OCUW is the lead contact for IRS SPEC and relevant communications received by OCUW are shared with the coalition through email communications, webinars, and in-person meetings. OCUW hosts an OCFTP pre-season meeting with local partners to address administrative issues and campaign goals.
- **Partner Funding:** OCUW understands that a robust VITA site can be burdensome on community partners. We do our best to alleviate financial burden by offering campaign partners the opportunity to apply for OCUW grant funding, while encouraging growth in production.



- **Volunteer Recruitment and Training:** The campaign hosts over 500 VITA volunteers per season. While volunteer recruitment is ongoing throughout the year via OCUW’s volunteer recruitment website “Get Connected”, OCFTP actively recruits volunteers for the upcoming season September through December. Campaign volunteers range from current students to retired professionals, and therefore we employ various methods of recruitment. OCUW develops and deploys volunteer training. Classes are supplemented by OCFTP training tips and tools and in-person trainings.
- **Site Coordinator Preparation:** OCUW hosts a season kick-off meeting in January with campaign partners. Topics of discussion include: IRS VITA regulations/requirements, ordering and receiving VITA materials, setting up tax preparation software, training and certification, national EITC awareness day, volunteer retention, quality review, customer service, and community engagement.
- **Paid Student Internship:** Each year, OCUW offers a paid internship opportunity for students with at least 1 year of VITA experience. These interns are assigned to robust VITA locations, and take on the role of Assistant Site Coordinator. From checking in volunteers, to quality reviewing tax returns, these interns help make the sites run efficiently and accurately.
- **Community Outreach:** OCUW is the major advertiser of the OCFTP campaign. OCUW develops and prints thousands of pieces of marketing flyers, posters, and collateral in English, Spanish, Korean, Vietnamese, and Farsi. We host the OCFTP main website (www.OCFreeTaxPrep.com) and leverage all partner networks to increase awareness-of and access-to VITA and FSA services.
- **Program Evaluation and Reporting:** OCUW leverages IRS reports and administers a campaign-wide taxpayer satisfaction survey and at the end of the tax season, OCUW compiles county-wide data utilizing various IRS, MyFreeTaxes and Franchise Tax Board reports. The total data is analyzed to understand the impact of the OCFTP Campaign in our community.

Highlights and Accomplishments, Filing Season 2019

In the 2019 tax filing season (TY2018), OCFTP served about 20,750 LMI clients throughout Orange County. Almost \$17.7 million in federal and state refunds returned to the community, with \$4.8 million in federal Earned Income Tax Credits (EITC). We estimate that taxpayers saved a minimum of \$4.2 million on tax preparation fees. Collectively, the program had a \$21,000,000 impact in the community, helping low-income taxpayers keep and attain income to support their family.

Countywide OC Free Tax Prep Results (Tax Season 2019)		
TOTAL RETURNS TRANSMITTED	20,738	(9.15% growth from last year)
TOTAL REFUND RETURNED	\$17,692,378	(8.84% growth from last year)
TOTAL RETURNS RECEIVING FEDERAL EITC	3,118	(2.13% growth from last year)
TOTAL VALUE FEDERAL EITC	\$ 4,778,643	(4.51% growth from last year)
PROJECTED SAVINGS FOR ALL TRANSMITTED	\$ 4,189,076	(9.15% growth from last year)

OCUW recruited and trained more than 500 volunteers, held 45 days of volunteer, site coordinator and partner tax trainings and as a result all volunteers completed at minimum the IRS Volunteer Standard of Conducts certification. Of the 500 volunteers trained, 456 of them went on to serve during the season and donated over 17,500 hours.



OCUW received more than 8,369 appointment phone calls from 01/01/2019 through 04/15/2019.

OCFTP enlisted 33 site partners who operated 61 free tax preparation sites. Collectively, we hosted over 450 free tax preparation events.

Over the past six tax seasons... the coalition has:

- Completed 107,000 tax returns
- Brought over \$93 million in state and federal refund back to community
- Helped low-income taxpayers access over \$25 million in federal EITC
- AND Helped folks save almost \$20 million dollars

Here are some of OCFTP highlights:

- CalEITC e-Bus Tax Prep, Buena Park, together with office of Assemblywoman Sharon Quirk-Silva
- CalEITC e-Bus Tax Prep, Costa Mesa, together with office of Assemblywoman Cottie Petrie-Norris
- CalEITC e-Bus Tax Prep, Costa Mesa, together with office of Assemblyman Tyler Diep
- American Sign Language Day, Irvine, in partnership with Irvine Valley College
- Military & Veterans Tax Event, Newport Beach, in partnership with Coastline Community College
- Financial Education Week Tax Prep, Santa Ana, in partnership with Mexican Consulate

The California EITC

OCUW was once again the sole regional recipient of the Cal EITC Education and Outreach Grant from the State of California, Department of Community Services and Development. Funding supported Cal EITC education and outreach activities and increased awareness of the Cal EITC and federal EITC credits and the VITA program among low-income individuals and families within Orange County, CA. OCUW promotes and maximizes awareness of EITC and the VITA program among low-income communities: (a) Directly to the public; (b) By engaging campaign partners that extend outreach into their local communities; and (c) By partnering with government and county organizations that are able to deploy wide-spread and targeted messaging.

OCUW extensively collaborated with community partners, funders, stakeholders and government representatives to get messaging out to both the low-income community and the providers that serve them. Outreach partners included: IRS, Franchise Tax Board, Department of Community Services and Development, CalEITC4Me, City of Anaheim, City of Irvine, City of Santa Ana, Office of Senator Tom Umberg, Office of Congressman Lou Correa, Office of Assemblywoman Sharon Quirk-Silva, Office of Assemblywoman Cottie Petrie-Norris, Office of Assemblyman Tyler Diep, Citi Community Development, Pacific Premier Bank, United Ways of California, United Way Worldwide, University of California Irvine, Coastline Community College, Irvine Valley College, Cal State University Fullerton, 2-1-1 OC, The OC Financial Stability Alliance, Hoag Memorial Hospital Presbyterian Community Benefit Program and our coalition partners located throughout Orange County.

Compared to last year, 6.02% more taxpayers residing in Orange County received the CalEITC credit for which they qualify. This results in ANOTHER \$21 million back to our community through this credit alone.



The following statistics “2018 Filing Season Returns Processed through June 12, 2019 (Most are 2018 Tax Year Returns)” were provided by the California Franchise Tax Board and reflect the total number of Cal EITC returns across Orange County.

# Returns		Allowed \$ Amount	
2018	2019	2018	2019
93,762	138,142	\$18,084,640	\$21,275,848

Thank You to Our Funders

