



Program Director's Board Report

October 16th, 2019

Off-Season Tax Preparation Results

Our Edison Center and Louisville Urban League tax sites remained opened from May 15th-October 15th to assist clients with late, prior-year, and amended tax returns. LABC completed 257 new returns during this period and provided tax assistance to 470 clients.

Coalition Building and Increased Service Offerings

VITA Leadership Institute

We have been invited to participate in the inaugural VITA Leadership Institute sponsored by Prosperity Now and Wells Fargo. This institute facilitates collaboration among nine other VITA programs across the country to share best practices. Additionally, Prosperity Now will provide technical assistance to help establish and use a capacity building plan and coalition building plan as needed.

CFE Grant Opportunity

The Cities for Financial Empowerment Fund (CFE) has invited LABC to submit a proposal to connect VITA participants to Bank On certified accounts. If selected, CFE will provide funding and technical assistance to assist with educating participants about the benefits of banking, to open accounts, and to ensure the accounts are used regularly. This grant opportunity complements our tax-time savings initiative and allows us to increase the variety of financial products available at the tax site.

Global Game Changers

Global Game Changers Student Empowerment Program (GGC) partners with Metro United Way and JCPS to facilitate “School Empowerment Zones,” at Byck, Cane Run, and Young Elementary Schools. GGC has asked LABC to provide educational training about tax time and personal finance to both students and parents during the 2020-2021 school year.

Tax Season 2020

Our goal for returns prepared this tax season is 8,900 returns. Low-to-moderate income individuals filed far fewer returns in 2019 than in previous years. Marketing and outreach will be a significant part of our strategy to reach new clients and to encourage these individuals to file their tax returns. Volunteer recruitment and training will also play a major role in our ability to serve clients.

New VITA Partnerships for 2020

- Eastern Area Community Ministries
- JCTC

Renewed Partnerships and Service Delivery Models

All of our previous site partners have committed to the same tax site hours as last year. We are also expanding our drop-off program to include the Portland Promise Center and Salt and Light Community Development Corporation. Additionally, we have the resources and network to increase promotion of our drop-off program for Metro employees.

Facilitated Self Assistance software will still be available on our website through Intuit’s Turbo Tax Freedom Edition. We will also have the ability to offer TaxSlayer’s FSA product at our tax sites and with some employer partners.

Taxathon

We will be holding our 3rd annual Taxathon on February 8th and 9th at the Louisville Urban League. This is our largest service event of the year and provides a powerful opportunity to promote VITA services, engage with clients, and connect participants and their families to other services and resources available in the community.

