

2004 – 2005
Volunteer Income Tax Assistance Program Plan

Agency: Broad Spectrum Community Development Corporation

Program: Volunteer Income Tax Assistance (VITA) Program

Period: February 1, 2005 – April 15, 2005

Program Summary:

Broad Spectrum Community Development Corporation (Broad Spectrum), working under an agreement with the Internal Revenue Service (IRS), to utilize Earned Income Tax Credits (EITC) will provide free federal and state income tax preparation assistance to low- and moderate-income individuals and families who live, work, and/or attend school in Long Beach. Further, Broad Spectrum will link these individuals to free mainstream banking services, financial literacy workshops, and asset building strategies such as homeownership and entrepreneurship opportunities. Broad Spectrum will be responsible for volunteer training, management of Broad Spectrum staff, data collection and reporting.

Tax preparation assistance will be provided at the Neighborhood Resource Center, (NRC) for approximately two days per week through April 15, 2005. Broad Spectrum will reserve use of the NRC facilities in advance. Tax preparation, processing, instruction and data collection will be performed by the trained volunteers of the Broad Spectrum. Broad Spectrum may refer clients to Union Bank to facilitate automatic deposit of tax refunds.

Services will be provided by appointments scheduled by Broad Spectrum. The NRC will provide the following resources for Broad Spectrum's use: use of it's Community Room; marketing/community outreach assistance including e-mail and postal mailings to neighborhood associations to promote the VITA service availability; translation services into Spanish and Khmer, as needed; use of computers; use of telephones; copy machine; fax; and use of office supplies.

Goals to Be Accomplished:

The goal is to provide asset building opportunities to at least 100 low-income working families of Long Beach by providing assistance with claiming the EITC and free tax preparation and electronic filing of federal and state income tax returns, and to link these individuals to mainstream banking services, financial literacy workshops and asset building strategies, such as homeownership and entrepreneurship opportunities.

Services will be provided by Broad Spectrum seeking to serve low and moderate income citizens. The services will be promoted through referrals from the following agencies:

- Neighborhood Resource Center
- Housing Authority
- Willmore Community Police Center
- Wrigley Information and Police Center
- Anaheim Corridor Police Center
- Seventh Street Community Police Center
- Renaissance Square
- Union Bank
- Operation Hope
- Long Beach Community Action Agency
- American Association Retired Persons (AARP)
- Long Beach City College
- California State University Long Beach
- Association of Community Organizations for Reform Now (ACORN)
- Internal Revenue Service

Target Populations:

The proposed targeted population is low- and moderate-income individuals and families who live, work, or attend school in the City of Long Beach. Income level will be determined by 2004 HUD Income Limits for low and very low income individuals.

Services will be available to all ethnic groups. Translation assistance for Spanish and Khmer speaking residents will be available by appointment. Marketing of the free tax preparation services will be conducted in English, Spanish and Khmer.

Program Services and Outcomes:

The following services will be provided or referred through the tax assistance program:

1. Income Tax Preparation Services
2. Mainstream Banking Services
3. Financial Literacy Workshops
4. Asset Building Opportunities

All services will be provided to clients free of charge. Broad Spectrum will serve as the lead agency for coordinating all program activities, including volunteer training and management, data collection and reporting.

Quarterly and Annual written reports will be given to the Manager of the Neighborhood Services Bureau, Department of Community Development, regarding the participation and delivery of services. The report will include, but not be limited to:

1. Activity summary / program documentation;
2. Daily program attendance;
3. Data on the age, race and gender of program participants;
4. Addresses of service recipients;
5. Number of people referred to open banks accounts;
6. Number of people referred to financial literacy workshops;
7. Number of people referred to asset building workshops;
8. Number of tax returns prepared;
9. Number of households eligible to claim EITC; and
10. Estimated dollar amount of EITC claimed by Long Beach households

The report will be due no later than the 15th day of the next month. Data from this report will be used for required reports submitted to the U.S. Department of Housing and Urban Development (HUD). Additional reporting information may be required for the City's annual Grantee Performance Report (GPR) to HUD.

Assessment and Evaluation

The Neighborhood Services Bureau Staff will meet on an as needed basis with Broad Spectrum administrative staff to assess and evaluate the progress of the program. Adjustments and/or modification of program services may be made by mutual consent of both parties.

Term

The term of the agreement will be from February 1, 2005 through April 15, 2005, with two one-year renewal options during the tax season based on satisfactory performance.