



Lori Jones
Agency Director

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December 16, 2011

Honorable Board of Supervisors
Administration Building
Oakland, CA 94612

Dear Board Members:

SUBJECT: Approval and Acceptance of a Grant from the United Way of the Bay Area (UWBA) for the Volunteer Income Tax Assistance (VITA) Program.

RECOMMENDATIONS:

For the Alameda County Social Services Agency (SSA) to provide free tax preparation services as a United Way of the Bay Area (UWBA) Volunteer Income Tax Assistance (VITA) site for Fiscal Year 2011-2012, it is recommended that your Board:

1. Accept a grant of \$14,500 on behalf of the SSA from the UWBA to conduct the Earn It! Keep It! Save It! Earned Income Tax Credit (EITC) Campaign, and authorize the SSA Director to sign and execute the new agreement with UWBA for the 2012 EITC Campaign; and
2. Approve the program expenditure budget of \$39,000

SUMMARY/DISCUSSION:

This letter requests action by your Board to accept the VITA grant funds and approve the agreement with UWBA for the EITC Campaign (Earn It! Keep It! Save It!). The Social Services Agency has participated in this program for eight years by using its Self-Sufficiency Centers during non-business hours as VITA centers for low income working individuals and families. The VITA centers will be at the North Oakland Self Sufficiency Center, Enterprise Medi-Cal Office, and the Eden Area Multi-Service Center.

The UWBA's Earn It!, Keep It! Save It! 2011 Annual Report noted that one in five Bay Area residents live in poverty. The Earned Income Tax Credit can boost the income for a low wage worker up to \$5,751. The goal of the EITC campaign is to increase the number of low to moderate income individuals who receive the maximum refund they are eligible for at no cost.

Three primary site coordinators and five co-coordinators will manage the three sites. Additionally, three professional tax transmitters will be hired to ensure the accuracy and timely electronic filing of the tax returns. The agency has recruited approximately 100 volunteers who are asked to commit to twenty-five hours of service during the tax filing period. Volunteers will be trained in tax preparation and certified. The SSA VITA sites will provide tax preparation from Saturday, January 28, 2012 through Saturday, April 14, 2012. The hours of operation will be Wednesday evenings from 5:30 p.m. to 7:30 p.m. and Saturdays from 9:00 a.m. to 12:00 p.m.

The proposed program budget is \$39,000 to be spent on staffing (4 professional tax transmitters, 3 security guards, and administrative staff), food for Wednesday evenings and Saturdays, the end-of-year recognition event, gift cards for site coordinators, and travel expenses (\$50 gift cards) for volunteers.

FINANCING:

The United Way FY 2011-2012 VITA Site grant of \$14,500 will be used to offset the cost of operating the three sites during the 2012 tax filing year. The grant funds will be augmented by \$24,500 from donated funds for the EITC program from prior years. There will be no net County cost impact.

Sincerely,



Lori Jones
Agency Director

cc: County Administrator
County Auditor-Controller
County Counsel
General Services Agency