



VITA San Antonio

Annual Community Investments

June 2023

2023 San Antonio VITA Coalition Performance

- 21,517 residents provided free tax prep assistance
- \$28.6 million in total refunds
- \$8.9 million in EITC dollars claimed by VITA taxpayers
- \$5.4 million saved in tax prep fees for consumers
- 61 volunteers recruited and supported
- 30 paid temporary staff engaged
- More than 75% of taxpayers utilize San Antonio drop off service
- Offers Alternative to Refund Anticipation Loan w/ RiverCityFederalCreditUnion



VITA San Antonio Coalition

Estimated Community

Investments

- **United Way of San Antonio and Bexar County: \$145,000**
 - \$100,000 Volunteer recruitment, support and management—contracted to nonprofit partner
 - \$ 20,000 Site operations for one location—contracted to nonprofit partner
 - \$ 25,000 VITA coalition marketing/advertising
- **Catholic Charities on behalf of San Antonio VITA Coalition: \$100,000**
 - \$100,000 Quality Reviewers, intake staff and some equipment—IRS VITA Grant
- **City of San Antonio Department of Human Services: \$550,000**
 - \$440,000 General Funds for direct operations by City staff and ~30 temp staff for 8 sites
 - \$100,000 General Funds for operations at 2 sites—contracted to 2 nonprofit partners
 - \$ 10,000 CSBG grant funds for printer toner, paper and other office supplies

Total Investments: \$795,000



Why City or County Investments in VITA?

- **Aligns w/ City goal to increase financial stability and success of residents**
 - EITC and Child Tax credit can increase a low-wage worker's annual income by up to 25%
 - Financially stable low-income taxpayers need less access to safety net programs and can invest in longer term positive impact activities such as buying reliable car to get to work, education for better job, etc.
- **Aligns w/ City goal to increase equity and protect consumers**
 - Free tax prep saved taxpayers an estimated \$5.4 million in tax prep fees
 - Coalition's unique partnership with River City Federal Credit Union reduces use of Refund Anticipation Loan (RAL) fees
- **Increases # returns by up to 55% by using paid staff as well as volunteers**
- **Helps local economy by ensuring that EITC eligible taxpayers claim credit**
 - \$1.78 million in additional EITC back to local economy (20% of total EITC payments)





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