

Exploring VITA Models from Across the Country



TACKLING COMMON CHALLENGES & FINDING BEST PRACTICES

growwithvesta.com

Agenda

- 01 WELCOME & INTROS**
- 02 THE BASICS + POLICY LANDSCAPE**
- 03 VITA MODELS**
- 04 RESOURCE SHARING**
- 05 Q&A**

Meet your **presenter**



Darren Liddell
Co-Founder / CEO
Vesta

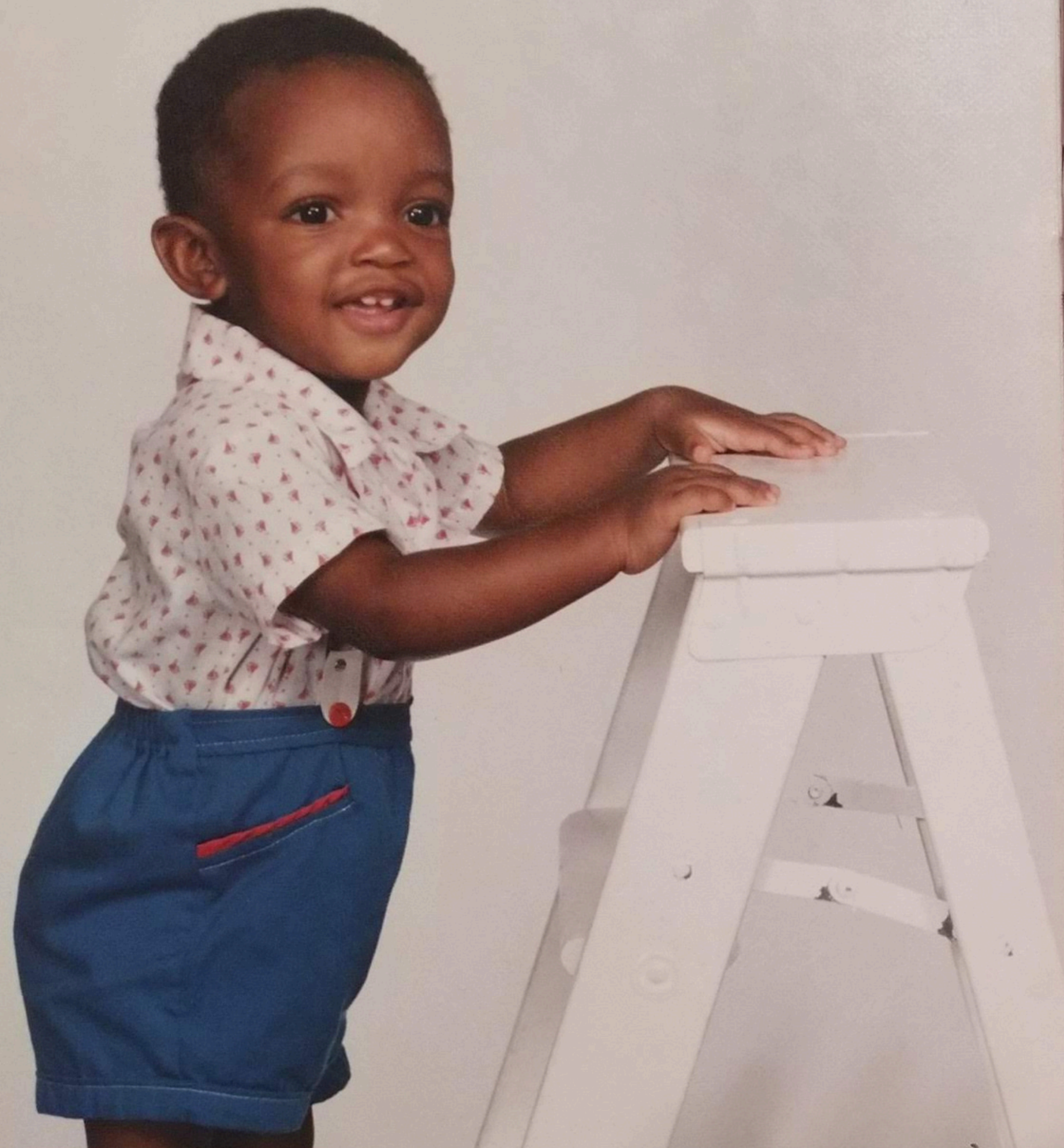
17 years in the VITA field, helping low- and moderate-income families navigate the tax system.

ALMA MATER

University of Georgia (UGA) - Go Dawgs

WHAT WE'RE BUILDING AT VESTA

Software for university VITA programs & community nonprofits. Designed to save time, expand reach, and put clients first.



Let's Get Started

Who is in the room
a quick activity

Mentimeter

Go to

www.menti.com

Enter the code

7115 2899



Or use QR code

Let's Get Started

VITA Across the US

the basics



Why this session matters for experienced VITA leaders

Goals

- 🔍 Surface patterns
- ✗ Expose contrast
- ⚠ Highlight ideas from different operating models

Not VITA 101

- 📖 We'll looking at VITA models from across the country
- 🕒 Funding models & their impacts
- ✓ Staffing & Volunteer models

BOTTOM LINE: DEEP DIVE AS MUCH AS POSSIBLE

Some data from **VITA/TCE programs**

For TY 2025 IRS awarded

53 million in grants

315 VITA grant orgs
41 TCE grants
145 LITCs

Across the US

9,500 VITA/TCE sites

76,000 volunteers
2.8 million federal tax prepared
95.77% accuracy rate

In Texas

The 2nd largest state

27 VITA grant orgs
1 TCE
7 LITC

Sources: 2025 IRS Publication 5683 & 2025 TAS Report to Congress

<https://www.irs.gov/pub/irs-pdf/p5683.pdf>

https://www.taxpayeradvocate.irs.gov/wp-content/uploads/2024/06/JRC25_APP_03.pdf

Trends

What makes VITA
programs **structurally**
different



VITA program structures

Funding environment

💰 IRS Funding

💵 Local government or foundation funding

🏠 Other funding

Staffing/Volunteer model

🚫 Staff run

✖ Volunteer run

⚠ Benefits limited to SSN filers only

BOTTOM LINE: FUNDING IMPACTS EVERYTHING

VITA program site formats

Site format / service delivery

 In-person traditional sites

 100% virtual (Catalyst Miami)

 Hybrid

BOTTOM LINE: CHOSE THE BEST FORMAT FOR YOUR CLIENTS

Additional format / service delivery

 Facilitate Self-Assistance (FSA)

 Valet/drop-off VITA (UW of Arizona)

 Small business serving models (Grow Brooklyn & NYC)

 Specialty Programs (College, High School, Immigrant,
Production workers, ect)

Trends

What makes VITA
programs **structurally**
different



Let's Look at two VITA Models

MODEL 1 **Hyper-local / volunteer-heavy programs**

Catalyst Miami

Smaller staff teams

Heavy volunteer reliance

Common in places like Florida / Texas-style environments

Tax prep during tax season. Coaching off season.

MODEL 2 **City-invested / staff-heavy programs**

Grow Brooklyn

More staff capacity: 70 PT (seasonal)

Ability to run weekday sites and support less volunteer-friendly hours

Largest funder: local government

Let's Look at two VITA Models

MODEL 1 **Hyper-local / volunteer-heavy programs**

Catalyst Miami

Team of 3-4 staff all part time VITA

Serves 600

VITA Funding Source: Coalition Partner + MDC funding

CAA, Refers to LITC, focused on tax time savings & CSA

MODEL 2 **City-invested / staff-heavy programs**

Grow Brooklyn

More staff capacity: 70 PT (seasonal)

Serves 10K

VITA Funding Source: NYC OFE + IRS

CAA, Refers to LITC, uses tech to scale services

More Models

A few additional
VITA models
to keep in mind



Trends

What strong
programs
excel at



Observations from **the field** (**across the country**)

Use technology

- Scheduling software
- Volunteer management tools
- Virtual intake systems
- Phone system management

Form coalitions and share what works

- Share best practices
- Share cost
- Bring together leaders
- Apply for funding together

Lagacy planing and having a pipeline of new volunteers/staff

- Prepare for the future
- University VITA programs
- Tradational VITA programs

Observations from **the field** **(across the country)**

Funding: Find new sources

Use the sale of networks to apply for funding

Find funders who see taxes as a way to empower
children and families

Expand services beyond the VITA moment

Tax time savings & asset building

Financial coaching & benefits navigation

Small business & legal service

Immigration and ITIN services

Policy advocacy opportunities & education

Best Practices

Helpful Resources

Prosperity Now Taxpayer Oppportunity Network

[Tax Roundtable Listserv](#)

[VITA Con](#)

[VITA Train](#)

VITA Community Resources

[LITC grant](#)

[VITA U conference](#)

[VITAresources.net](#)

[vitaquality.org](#)

Emerging / sensitive area

Serving Immigrant Taxpayers

Use the sale of networks to apply for funding

Find funders who see taxes as a way to empower
children and families

ACA & Healthcare Changes

Tax time savings & asset building

Financial coaching & benefits navigation

Small business & legal service

Immigration and ITIN services

Policy advocacy opportunities & education

Where technology fits

Funding: Find new sources

Virtual Intake: Get Your Refund

Volunteer Management:

Client Scheduling:

Schedule C

Expand services beyond VITA moment

Tax time savings & asset building

Financial coaching & benefits navigation

Small business & legal service

Immigration and ITIN services

Policy advocacy opportunities & education

Resources & Discussion

A few resources &
**time to share your
experience**



Next Informal ITIN Call

Topics

- 01** SUPPORTING IMMIGRANT FILERS
- 02** CURRENT CAAS & ITIN SUPPORT
- 03** ITIN FILER ADVOCACY

NEXT CALL

Sept 29

2PM ET / 11AM PT

Immigration policy
updates + breakouts room



RSVP

Designed for VITA programs

VESTA PROVIDES

Software for VITA programs



Virtual 13614-C



Appointment scheduling



ITIN/CAA assistance



Schedule C expense gathering



Training resources & volunteer mgmt



Ongoing implementation support

PARTNER PROVIDES

Insights to improve workflows, tools, and client experience



EXISTING CLIENT RELATIONSHIPS



Basic staff coordination



Tax preparation workflow participation

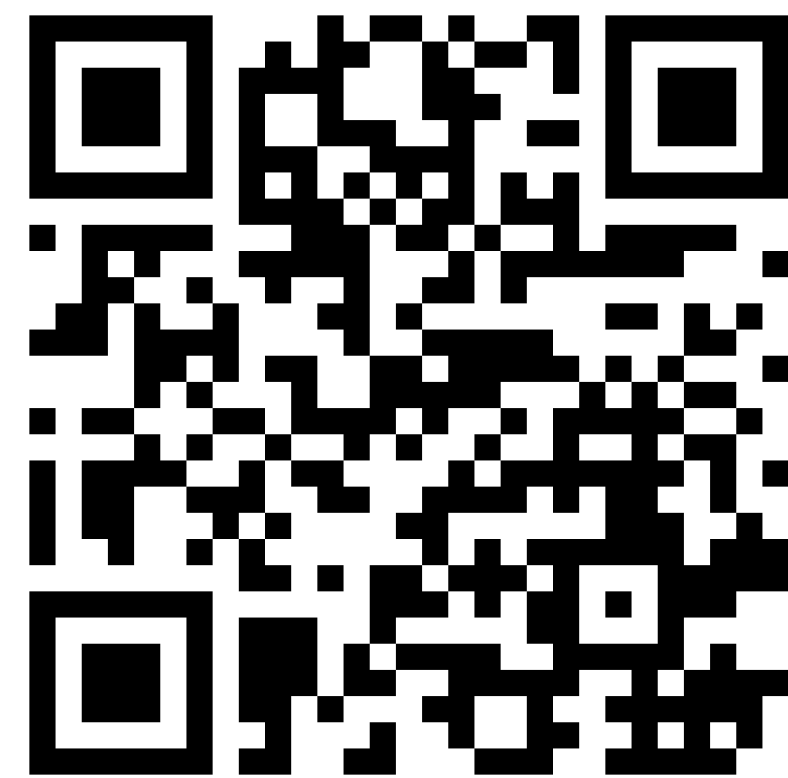


Pilot feedback

BUILT FOR UNIVERSITY VITA PROGRAMS & NONPROFITS TO SAVE TIME AND EMPOWER CLIENTS.



Client privacy first, built
w/ VITA programs &
looking for partners.





Questions?





Discussion at your table

VITA Community Resources

Introduce yourself to your neighbor / someone you don't know

Name, Organization Year in VITA

What are the challenges you face in your programs current model?

What do you commit to trying this upcoming tax season?

