



# Strengthening Neighborhoods through Free Tax Preparation

August XX, 2009



**AAS** ACCOUNTING  
AID  
SOCIETY

*Where taxes, accounting, and aid come together*

# Background

## Accounting Aid Society

- ▣ 35 years free tax preparation – VITA
- ▣ Year-round LITC Clinic
- ▣ 700 volunteers, 30 tax sites
- ▣ 13,500 clients

## Detroit

- ▣ High unemployment, poverty
- ▣ City budget crisis
- ▣ State credits
- ▣ Neighborhood focused initiatives for revitalization

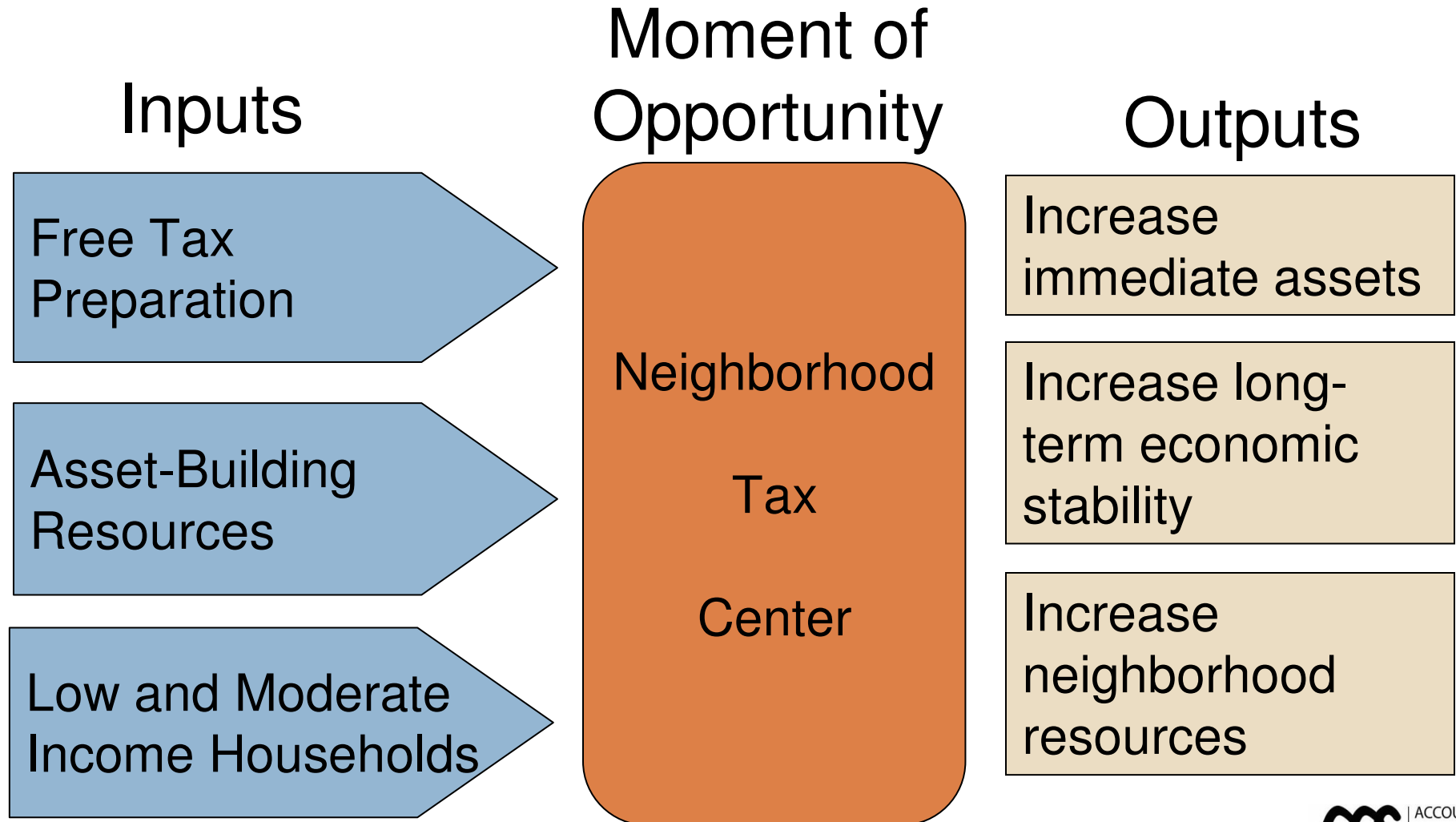
# Concept: Neighborhood Tax Centers

## Strengthen neighborhoods by

- Immediately increasing the assets of families through tax refunds and credits
- Increasing the long-term economic stability of families through collaboration of community groups
- Developing a continuum of neighborhood wealth-building resources

Free Tax Preparation is the cornerstone

# Concept: Neighborhood Tax Centers



# Activity 1: Identify Need

<b>Define Target Population</b>	<b>Element that is Unique</b>	<b>Source of information</b>
<b>Client Demographics</b>		
<b>Client Wants and Needs</b>		
<b>Neighborhood Characteristics</b>		
<b>Neighborhood Resources</b>		

# How to: Planning/Approach

Program Plan	Key to Success
Asset-building resources	Trusted community partners
Timeline	Year-round presence
Funding	Multiple-year commitment
Outcomes	Program logic model
Budget	Budget

# How to: Implementation

Recruiting Community Partners

Outreach and Marketing

Staffing

Location and hours

Data collection

Client survey

Determine Needs

Capture changing:

Needs

Behaviors

Marketing

Keep simple

Be respectful

Possible to  
automate

# How To: Evaluation

## Short Term

- # clients and refunds
- Direct Deposit

## Intermediate Term

- Increased availability of free tax services
- Increased access to financial tools

## Long Term

- Increased navigation of financial system
- Increased use of financial resources

# Keys to Success

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- ❑ Clients are respected customers
- ❑ Trusted community partners
- ❑ Multiple-year funding
- ❑ Appointments
- ❑ Defined roles
- ❑ Provide valued services
- ❑ Year-round presence
- ❑ Measurable Outcomes



THANK YOU

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