



Montgomery County, MD

Department of Health and Human Services

Community Action Agency

VITA Partnership





Department of Health & Human Services

Community Action Agency (CAA)

- Founded during the “War on Poverty.”
- Part of County government–
DHHS Office of Community Affairs.
- 1 of 3 public Community Action Agencies in Maryland
- CAA services are based in our Wheaton office and at the “TESS” Center (*Takoma/E. Silver Spring*).
- Administer CSBG and Head Start grants, and 40+ county contracts to nonprofit partners.
- Federal CSBG grant, training and activities supported by Maryland’s DHCD, with Maryland Community Action Partnership.
- Funding for CAA’s administration and direct services supplemented by Montgomery County.



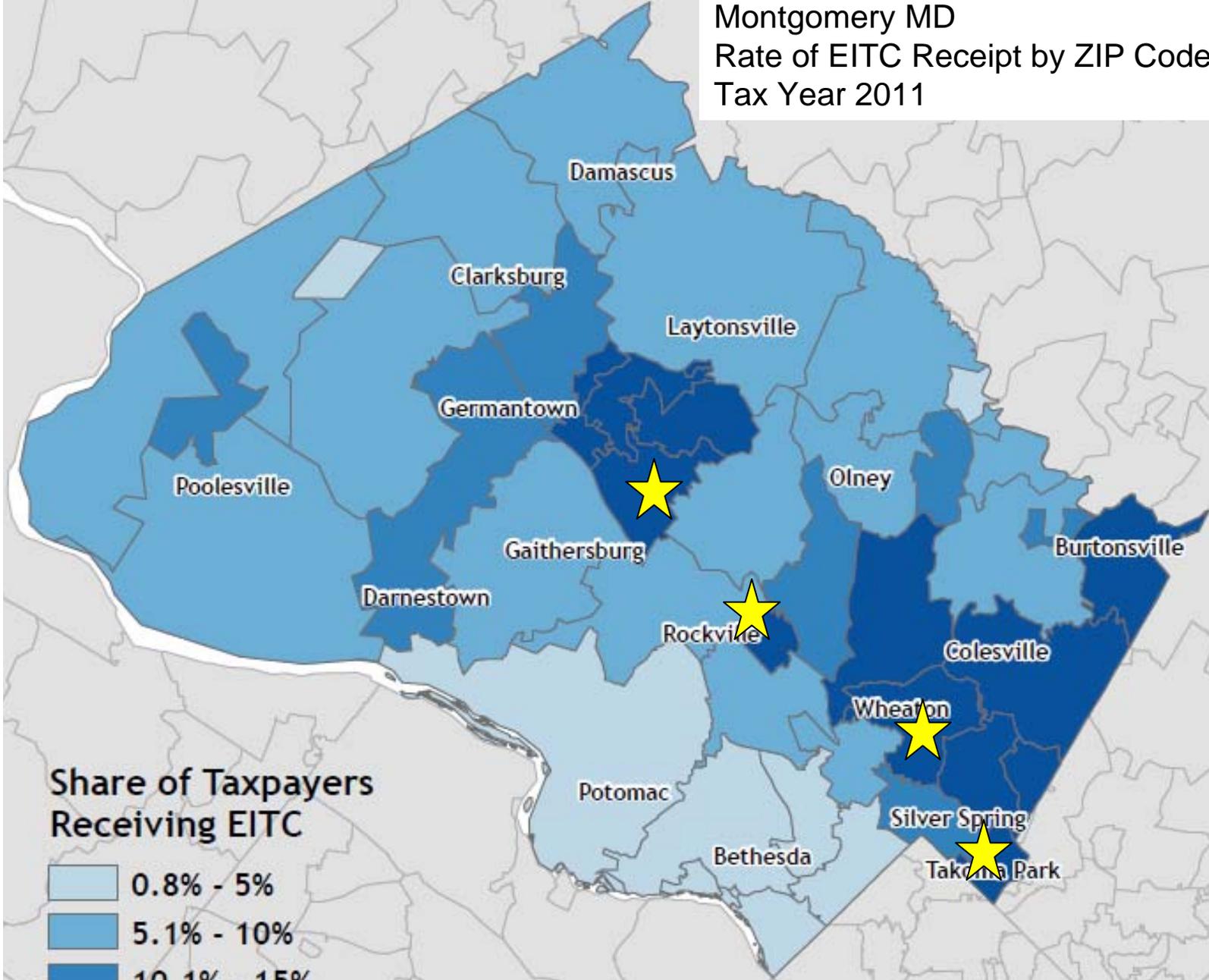
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VITA Partnership

- 30+ years of volunteer supported free tax help, originally at TESS.
- Expanded VITA during “ARRA” to 4 sites, (adding cities of Rockville and Gaithersburg), integrating financial education, and joined Maryland CASH Campaign.
- Community Action Board (CAB) has prioritized increasing EITC as an effective anti-poverty strategy, and expansion of VITA to assure outreach and access.



Montgomery MD
Rate of EITC Receipt by ZIP Code
Tax Year 2011



Source: Metropolitan Policy Program at Brookings Analysis of IRS data

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The IRS

Maryland CASH Campaign

City of Rockville

City of Gaithersburg (Bank On) &
Family Services, Inc.

U. of Maryland's Cooperative
Extension

School of Public Health

Head Start

Coalition for the Advancement of
Financial Education, Montgomery
MD

Spanish Catholic Center

Maryland Hunger Solutions



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VITA Partnership



Structure & Features:

- VITA Coordinator, Contractor & Community Fellow (student), partners and volunteers.
- Appointment system includes language preferences & accommodations– with email and text reminders.
- Year round: “back-taxes” and amended returns are prepared, June to November (Wheaton and Rockville); outreach to public and nonprofit agencies and their customers is a priority.
- Targets customers earning <\$53,000 a year.
- Services to VITA eligible Self-Employed tax-payers.
- VITA coordinator is a Certified Acceptance Agent for taxpayers requiring an “ITIN” to file.

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VITA Partnership

Spotlight: Gaithersburg

Asset Building through:

- “Bank On”
- Financial education
- VITA
- US Savings Bonds
- Public benefits (ie SNAP, ACA)
- Community resources
- Small business development
- Ongoing education targeting consumers, providers and businesses

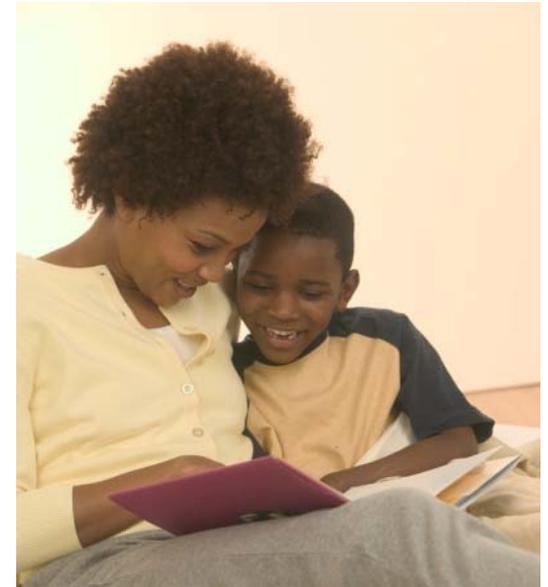


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Outcomes: January – November 2014

- ✓ 70+ volunteers provided 2,100+ hours of tax prep & support at multiple sites, including language interpretation.
- ✓ 2,073 filed returns, including 274 schedule C's or CEZ's.
- ✓ Taxpayers received \$4,089,093 in federal and state refunds and credits, including federal, state and county EITC.
- ✓ Taxpayers owed \$1,041,198 to state and federal government



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TTY 240.777.3556 MD RELAY 711



eitc
earned income tax credit

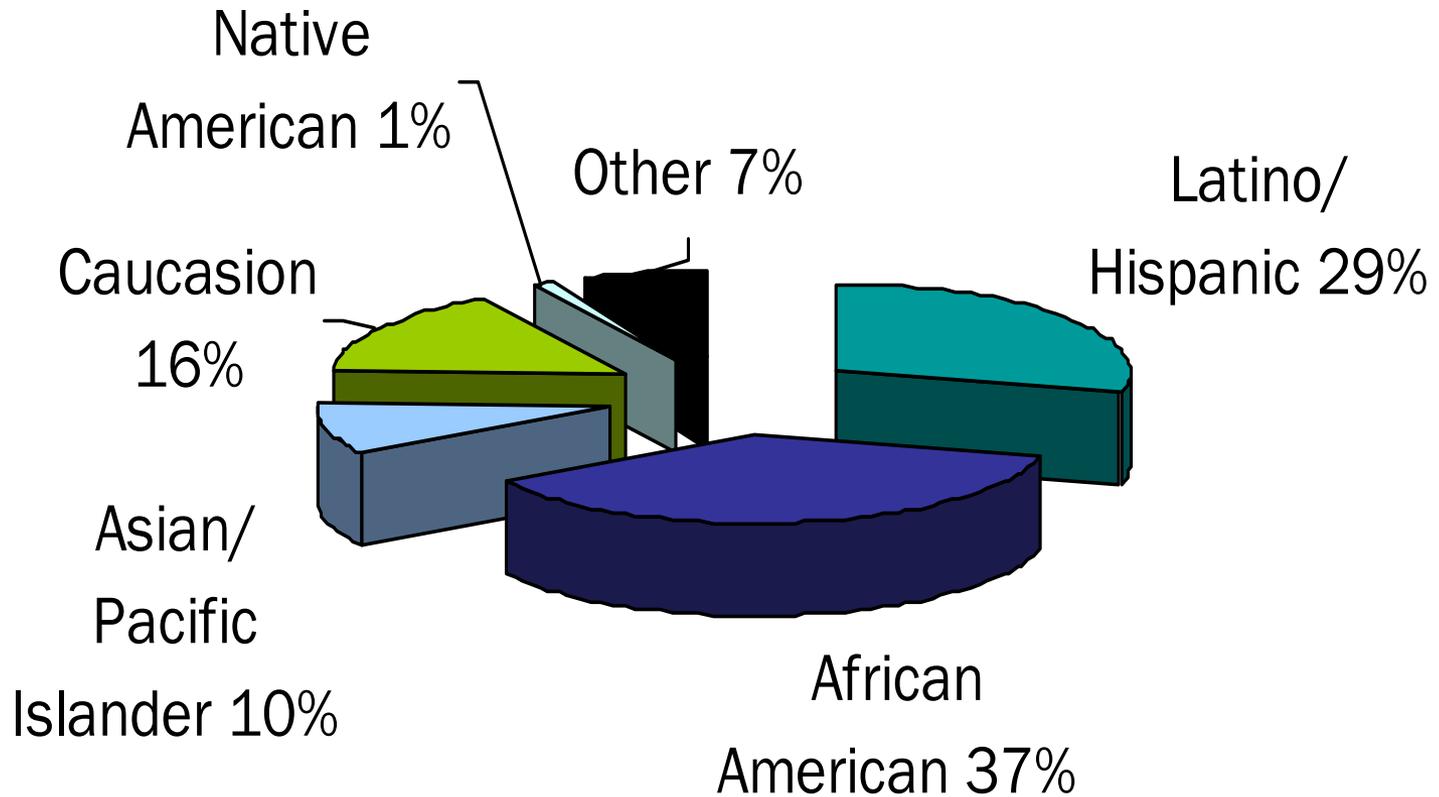
MC311
ANSWERING TO YOU



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VITA Partnership

Our Diverse Customers- Ethnicity:



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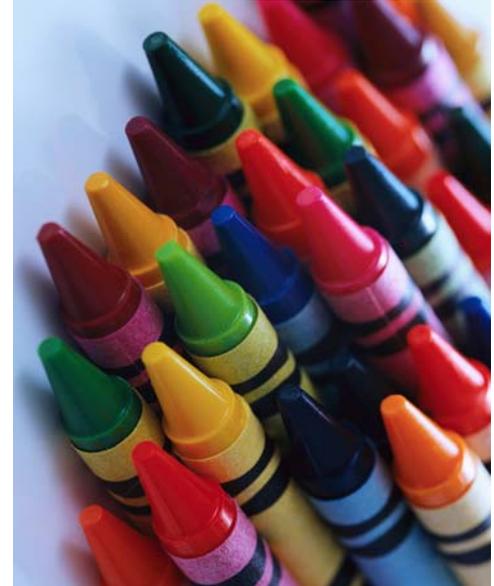
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Our Diverse Customers- Language:

45% Spanish, 9% Chinese, 5% French, 3% Korean, 3% Amharic speaking. 35% spoke other languages.

Our Diverse Volunteers- Language:

68% of our volunteers (and staff) are bilingual, speaking Spanish, French, Chinese, Japanese, Tagalog, Farsi, German, Amharic, Hindi, Italian, Korean, Russian and Yoruba.



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VITA Partnership: Free Tax Community

Growing a Coalition with community-based free tax preparers:

Traditional:

- ❖ AARP (Tax Counseling for the Elderly), Montgomery County Volunteer Center “RSVP”
- ❖ Wheaton Library- founded by IRS professionals
- ❖ Community Tax Aide- DC based, with services in suburbs

Emerging:

- ❖ Chinese Culture and Community Service Center
- ❖ Spanish Catholic Center (Language interpretation)
- ❖ CASA de Maryland
- ❖ Ana Mendez University

Characteristics: Shared information (“311”); shared resources and training; cross referral of volunteers and customers.

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EITC Outreach

EITC Filers (Federal) Montgomery County MD

53,183 filed in Tax Year 2012

44,186 filed in Tax Year 2007



75 – 80% Claim EITC

20 - 25% Do Not



6,653 returns, TY 12

*(filed by volunteers
affiliated with free tax
partners in Montgomery
County)*

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Linkages with public services & community resources



Child Care, Head Start & Youth Services

Shelter & Utilities

Aging & Disability Supports



Health/Behavioral Health Care Food & Basic Needs

Immigration

Victims Services



Banking

Legal

Identity Theft

Business Development

Adult & Financial Ed

Montgomery County, Maryland

EITC-eligible population

TOTAL POP. IN EITC-ELIGIBLE UNITS

121,886

TOTAL CHILDREN IN EITC-ELIGIBLE UNITS

49,403

EITC-eligible tax unit characteristics

FILING STATUS

20.6% Married filing jointly

48.6% Head of household

30.8% Single

MEDIAN ADJUSTED GROSS INCOME

\$12,595

SHARE RECEIVING FOOD STAMPS/SNAP

20.8%

EITC-eligible tax filer characteristics

HIGHEST LEVEL OF EDUCATION

HIGH SCHOOL OR LESS 41.8%

SOME COLLEGE OR ASSOCIATE'S 29.8

BACHELOR'S OR HIGHER 28.4

TOP FIVE INDUSTRIES

RETAIL TRADE 18.8%

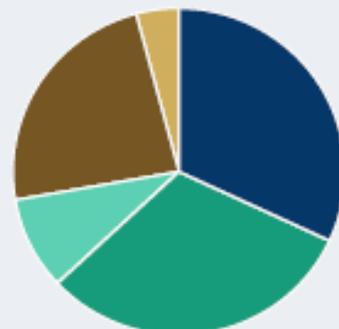
ACCOMODATION, FOOD SERVICES 12.7

HEALTH CARE 11.4

OTHER SERVICES 8.4

CONSTRUCTION 8.1

RACE AND ETHNICITY OF TAX FILER



- White 32.0%
- Black 31.2
- Asian/Pacific Islander 9.2
- Hispanic 23.6
- Other 4.1

TOP THREE LANGUAGES SPOKEN

ENGLISH 46.8%

SPANISH 23.3

AMHARIC 5.7

TOP FIVE OCCUPATIONS

OFFICE AND ADMINISTRATIVE 16.8%

SALES 11.7

TRANSPORTATION & MATERIAL MOVING 9.0

FOOD PREP. AND REL. SERVICE OCCUPATIONS 8.6

PERSONAL CARE 8.2

NOTES AND SOURCES

Source: MetroTax model estimates based on 2010 American Community Survey microdata.

See [User Guide](#) for details



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