



HRA & Central Connecticut VITA Historical Performance

Human Resources Agency of New Britain, Inc. (HRA) has led the New Britain Asset Building Coalition and has successfully operated the Volunteer Income Tax Assistance program in New Britain since 2004, consistently increasing the accessibility and quality of the services. Over the past 15 years we have filed a total of 48,609 returns resulting in a total of \$78,259,700 in Federal refunds. Over 38% (\$29,841,193) of these federal dollars have been from Earned Income Credit claimed (see comparison of years below). This is in keeping with the original goal of the NB Asset Building Coalition to expand EITC Outreach and education, increasing the number of low-income families claiming the Earned Income Credit.



Tax Year Filed	Clients Served	Total Refunds	Total and % EITC
2018	6579	\$10,352,312	\$4,018,397 = 33%
2017	6107	\$9,568,945	\$3,785,379 = 34%
2016	5629	\$8,908,361	\$3,474,747 = 40%
2015	5484	\$9,053,608	\$3,390,835 = 35%
2014	5015	\$8,122,198	\$3,026,602 = 32%
2013	4399	\$7,373,554	\$2,718,701 = 37%
2012	2571	\$4,882,375	\$1,872,424 = 37%
2011	2409	\$4,633,731	\$1,721,609 = 37%
2010	2230	\$3,935,025	\$1,410,086 = 36%
2009	2000	\$3,216,116	\$1,199,268 = 37%
2008	1339	\$2,052,715	\$773,190 = 37%
2007	1602	\$1,791,579	\$797,108 = 44%
2006	1099	\$1,611,731	\$617,832 = 38%
2005	945	\$1,252,044	\$484,444 = 39%
2004	719	\$891,721	\$346,706 = 39%
2003	482	\$613,685	\$203,865 = 33%



2019 Tax Season Special Report

Dr. Catherine R. Baratta, Board President

Rocco R. Tricarico, J.D, Executive Director



EITC Outreach, Volunteer recruitment and training were conducted during the Fall of 2018 to prepare for the season. Thousands of flyers, pamphlets, and postcards were distributed to advertise the services and attract volunteers. As a result, we had great success in securing **199** committed volunteers to serve **6,579** customers within our target population of people with earned income of less than \$55,000. Our Foundations For Financial Independence Program for youth supported participants in achieving their continuing education goals with the help of our partners. This report was prepared by our team to highlight everyone's accomplishments! Enjoy!

Who we served...

- **6,579** residents of **New Britain, Bristol, Meriden, Wallingford** and surrounding towns.
- The average age of a taxpayer in our program was **44**. The oldest taxpayer served was **103** this season.
- **86.4%** of customers had obtained a **High School diploma/GED** or better.
- **272 (4.13%)** filed for an Education Credit.
- Taxpayer ages: Under 18 to 24 (**25.20%**), 25 to 40 (**47.68%**), 50 to 80 (**26.62%**), 80+ (**0.50%**)
- **5,112 (87.31%)** had Full Year Health Care Coverage
- **3,906 (67.29%)** requested Direct Deposit on their returns.

Customer survey results...

- **84.81%** rated the services overall as **EXCELLENT** and **14.61%** as **GOOD**
- **85.92%** felt the program's ability to meet their needs was **EXCELLENT** and **14.08%** as **GOOD**
- Overall **less than 1%** indicated that the services need improvement
- **18.6%** of customers were **first time** filers or **did not file** last year

Most requested addtl. service needs

HRA customers requested expressed a need for additional services in the following areas listed by priority:

1. Affordable Housing (51.00%)
2. Energy Assistance (42.00%)
3. Free Tax Preparation (32.00%)
4. Learning about Credit or Repair (18.00%)
5. Budgeting (16.00%)

VITA Mobile Sites

In prior seasons HRA had consolidated their smaller sub-offices into one mobile operations unit. This mobile unit would operate in different cities and towns in the State of Connecticut. The Mobile VITA operation continued operations at the Southington Community Services, the Town of Vernon's Community Services Department, the Wallingford Public Library, Tunxis Community College, and the Spanish Community of Wallingford. A new location at the Farmington Social Services office opened up this year through the VITA Mobile.

For the 2018 tax season, VITA Mobile did a total of 664 returns exceeding the HRA's goal of 465 returns. The total Earned Income Credit for VITA Mobile 2018 was \$246,768; the average AGI was \$24,075 and the total refund amount was \$783,550.

- **Vernon Social Services:** 63 returns, average AGI at \$17,437, a total EIC of \$37,168 and a total refund amount of \$86,455.
- **Southington Community Services:** 44 returns, average AGI at \$25,938, a total EIC of \$8,849 and a total refund amount of \$46,206.
- **Spanish Community of Wallingford:** 53 returns, average AGI of \$23,995, a total EIC of \$9,834 and a total refund amount of \$59,516. Increase of 15.22% from TY2017. The site also completed 7 Individual Taxpayer Identification Number Applications.
- **Tunxis Community College:** 137 returns, average AGI of \$23,723, a total EIC of \$65,272 and a total refund amount of \$178,891 Increase of 98.55% from TY2017.
- **Wallingford Public Library:** 205 returns, average AGI of \$24,910, a total EIC of \$65,054 and a total refund amount of \$252,674 Increase of 35.76% from TY2017.
- **HRA Bristol Office:** 295 returns, average AGI of \$20,066, a total EIC of \$239,794 and a total refund amount of \$337,907. Increase of 102.05% from TY2017 and its numbers were reported under United Way of Bristol.
- **Plymouth Human Services:** 84 returns, average AGI at \$25,333, a total EIC of \$11,467 and a total refund amount of \$70,379. Increase of 154.55%
- **Farmington Social Services:** 40 returns, average AGI at \$26,053, a total EIC of \$12,808 and a total refund amount of \$56,710. This location was new for TY2018.

2018-2019 VITA Team:

Marlo Greponne - Program Director
Juan Berrios - Program Manager, NBHS & Arch Street Site Coordinator
Dianette Martinez - Southington Region and North Oak Site Coordinator
David McGhee - Assets Management Coordinator
Tomasz Kandybowicz - VITA Mobile & United Way Bristol Site Coordinator
Roxanne Rainford - Oak Street Site Coordinator
Katie O'Donnell - HRA Career Center Site Coordinator
Barbara Stubbs - Arch Street Site Coordinator
Samanta Music - Wallingford Site Coordinator
Laila Alwishah and Kenneth Case—Greeters
Kenneth Beaudry - Meriden Public Library Volunteer Site Coordinator



NB Asset Building Coalition Building A Foundation For Family and Economic Stability

HRA Career Center at 144 Clinton Street

This season marks the 10th year in operation for the HRA Career Center VITA site, formerly known as Scarlett Drive. This season, there was a change in location to a newly renovated center located on 144 Clinton Street in New Britain. With a change in location came a change in branding for the services provided by HRA at the location. HRA's Career Center provides Employment and Training opportunities for Adults 24 and older and Youth ages 16-24.

The center prepared a total of 127 returns this season. The average Earned Income Credit at Scarlett was \$2,389 representing an additional \$93,162 in EIC dollars to the taxpayers. The average refund amount was 1,914 totaling \$214,333 in refunds returned to the taxpayers.

North Oak Community Center

The HRA North Oak Community Center is located on 35 Oak Street in New Britain and has been in operation as a VITA site since 2005. Oak Street began its 14th VITA Season on January 22nd, 2019 and operated on Tuesdays, Wednesdays and Thursdays from 3:00pm-8:00pm and on Saturday's from 9:00am-3:00pm. **Over the last nine years Oak Street has grown to be the largest VITA site in the State of Connecticut preparing over 2,000 returns annually. In the current season, Oak Street was the only VITA site to break 2,000 returns across the state and is the largest VITA Site in Connecticut.**



This season, 2,205 income tax returns were completed on Oak Street with customers receiving an average refund of \$2,307. The total refunds on Oak Street were \$4,006,612; \$1,684,819 of those dollars came from EITC and \$1,374,394 from other credits such as the Child Tax Credit, Additional Child Tax Credit and Education Credit.

Overall, the Oak Street site had a great season with a great team of dedicated volunteers!



NB Asset Building Coalition Building A Foundation For Family and Economic Stability

The VITA Youth Program and New Britain High School

Over the last nine years, HRA has worked with staff at New Britain High School on the VITA Youth Program. This year, HRA partnered with United Way of West Central CT to expand the youth program into their service area. Ten Students from Bristol, Plainville, Plymouth and surrounding towns volunteered this year as part of the new pilot in the area. Overall, HRA recruited 93 students to become IRS Certified Tax Preparers which is the most the program has ever had. Over the course of the season 46 students continuously volunteered at HRA's local sites. The students completed a total of 2,259 volunteer hours and 1,174 returns. In addition, the average rejection rate for the students was 6%.



HRA also hosted a site at New Britain High School. The NBHS site completed a total of 166 returns, an increase of 21.17 from TY2017, returning \$315,253 in refunds.

HRA partners with New Britain High School's NAF Academies who sponsor the program. HRA thanks the NBHS Academies Staff for all of their help and support during the 2018-2019 School Year.

Meriden Public Library

The Meriden Public Library (MPL) site has been the largest VITA site in the Meriden region for over 30 years. The library began its partnership with HRA during the 2013 Tax Season through a collaboration between the Library, the United Way of Meriden and Wallingford and the Internal Revenue Service. The Library is well known for its veteran VITA Volunteers, most of whom have volunteered for over ten years! The MPL is 100% volunteer run and is led by Kenneth Beaudry, a volunteer Site Coordinator, with additional support from local partners and HRA.



This season, the MPL site completed a total of 1,225 returns which is a 12.49% increase from TY2017. The site also gained additional new volunteers this season. The Library is the 5th largest VITA site across Connecticut.



This year marks the final season for Kenneth Beaudry as Site Coordinator of the Library. HRA thanks Ken for the tremendous support over the last six years and wishes him well on all his future endeavors. Ken will be sorely missed as an "unofficial" member of the HRA VITA Team.

NB Asset Building Coalition Building A Foundation For Family and Economic Stability

Arch Street Neighborhood Center

The Arch Street Neighborhood Services Center completed another successful tax season ending on April 15th. The site is home to the HRA Energy Assistance Program, HSI and SSBG Case Management Programs, and the central call center for the VITA Program. In addition, the site is a home for the VITA Youth Program with Youth Volunteers primarily volunteering on site on Wednesdays, Thursdays and Saturdays.

This season, the site completed 1,466 returns which is an increase of 4.19% from TY 2017. The average refund amount for the site was \$1,999, total refund amount was \$2,562,117. Out of the refund totals \$1,038,249 was from the Earned Income Tax Credit.



The Arch Street office has been open now for 10 years and was the 3rd largest VITA site across the State of Connecticut this season.

The Arch Street Site Coordinators thank their team of dedicated volunteers for another very successful tax season!

United Way of West Central CT - Bristol VITA

HRA's sites in Bristol operated out of two locations this season. The HRA Bristol Office operated on Monday evenings and Thursday afternoons and the United Way of West Central CT location on Tuesday evenings and Saturday mornings.

For the 2018 Tax Season, the sites completed a total of 726 returns which was a 28.95% increase from TY2017. The total refunds brought back to the greater Bristol community was \$936,316 with the average refund being \$1,402.

This year, the site attained ten High School students as VITA Volunteers through United Way's Youth Board. HRA also partnered again with Tunxis Community College to provide additional volunteers at each Bristol location.

Foundations for Financial Independence (FFI) - Connecting VITA to Financial Stability

Each tax season HRA makes an effort to link VITA to other Financial Stability related programming. During the 2018 tax season, taxpayers had the opportunity to connect to a few programs to help their money grow.

This year the Foundations for Financial Independence (FFI) Program made an effort, with some guidance from The CFPB's (Consumer Financial Protection Bureau) Office of Financial Empowerment, to encourage **Savings at Tax Time**. During the tax season, VITA taxpayers had options to connect to Financial Education Trainings, one-on-one Financial Coaching, saving incentives (**Save Your Refund** and **ALICE Saves** programs), and Split Refunds (**Form 8888**). Several tax payers enrolled in HRA's **Project Reinvest Financial Capability Program** for assistance in creating personal financial plans, budgets, building credit, credit repair, and managing debt. New Britain High School interns attended workshops on Personal Financial Literacy.

IRS Community Service Leadership Awards

Since Tax Season 2013, Site Coordinators have nominated VITA Volunteers who have gone above and beyond the scope of their volunteer duties the IRS Community Service Leadership Award. This season, the Coordinators of Oak, Arch, Bristol, Meriden and Wallingford have nominated the following volunteers for this prestigious award:

Ewa Beclawski - North Oak Community Center, HRA Bristol
Jonathan Cosme - North Oak Community Center, Tunxis CC
Halina Leckasz - HRA Career Center, North Oak Community Center
Nancy Micloskey - United Way Bristol
Arcis Rodriguez Matey - Arch Street Neighborhood Center, New Britain High School
Noemi Theriault - HRA Bristol
Mario Velasquez - North Oak Community Center
Jack Vieira - Arch Street Neighborhood Center



Rookie of the Year

The Rookie of the Year award is given to New Volunteers who have not only gone above and beyond the scope of their volunteer duties in the program but has shown tremendous growth and progression throughout their first year experience.

Erica Bodden - Farmington, HRA Bristol
Stephanie King - Arch Street Neighborhood Center, UW Bristol
Patrycja Panek - North Oak Community Center, NB High School
Samantha Plebanek - United Way Bristol, United Way Youth Board
Regena Smith - Arch Street Neighborhood Center, HRA Bristol

