

May 11, 2007

Johnette T. Hartnett, Ed D.
Director of Research
National Disability Institute
1667 K Street, Suite 640
Washington, DC 20006

Dear Johnette,

Thank you for a wonderful conference call yesterday! We gathered so many ideas from the other sites reporting out. I wanted to let you know that I tried to report out twice and it was not picked up, but we also have some great news!

The CA\$H Coalition of the Capital District received \$10,000 from HSBC to increase participation and access to VITA and EITC. These funds supported the entire Coalition as well as our own Disability Initiative efforts through SPEC that were already underway.

Wildwood Programs was also identified as a collaborating partner on a three year United Way grant to Health and Human Services focusing on providing outreach and services for financial education and asset-building to individuals with disabilities. The grant proposal is for \$50,000 for each of three years. We are thrilled with these developments that will assist in creating and sustaining ongoing supports, services and relationships for individuals with disabilities.

The report from Wildwood Programs on behalf of the Greater Capital District CA\$H Coalition, Albany, NY, is enclosed. If you have any questions or concerns about the report, please feel free to call me at 518-783-9260, Ext. 5538.

Sincerely,

Melinda Burns
Director of Adult Education
mburns@wildwood.edu

Real Economic Impact Tour Grant

May 11, 2007

Final Report

a.) Description of planned REI Tour special events and activities:

The CA\$H Coalition, represented by Wildwood Programs a disability organization in the Capital District of New York, completed several community events and activities.

All current VITA sites were reviewed for accessibility and sites were identified with the wheelchair accessible symbol. One of the Coalition members, AARP, shared best practices for their individuals with physical disabilities as well as hearing impairments. An assessment of additional accommodation needs was done.

On 2/16/07, a VITA/EITC Day was held at the Capital District Center for Independence in Albany, NY. (Independent Living Center). Brian McLane from the NDI, Neil Breslin our County Executive, and Jeffrey Pearlman, Disabilities Law Clinic spoke at the opening ceremonies. Representatives from Bank of America, Social Security and Department of Labor held individualized financial education sessions throughout the day. Our local Independent Living Center conducted disabilities training for VITA volunteers on the VITA Days. This training model will be used for all Coalition members and VITA volunteers in the upcoming year. Individuals with disabilities will be included in the training. Specific information on the disability survey will also be included to assist in gathering data more accurately. Over 25 tax returns were completed.

On 2/23/07 an additional VITA/EITC day was held at Wildwood Programs. An additional 10 returns were completed and individualized financial education information provided.

On 2/15/07 Social Security representatives provided a special financial education workshop: "Social Security, Part 1- Securing Benefits" to over 25 participants and staff who work with individuals with disabilities. On 3/15/07, "Social Security- Part 2, Work Incentives" explained the specifics of these benefits to 40 participants. Both were held at the Center for Independence facility in Albany, NY, an easily accessible location on a bus-line.

b.) Description of planned REI Tour marketing and media outreach (marketing of disability EITC sites, accessible sites, financial education events, etc.):

On January 23rd, a press conference was held at Albany Law School that highlighted the CA\$H Coalition and the Disability Initiative. Commissioner David Hansell of the State Office of Temporary and Disability Assistance was the keynote speaker and highlighted the financial needs of individuals with disabilities. We received television and newspaper coverage. (A sample is enclosed.)

HSBC funds were used to purchase VITA sidewalk sandwich boards and bus bulletin boards that identified VITA sites in the Capital District area throughout the tax season. This increased foot traffic to all VITA sites. Our United Way partner also created a website that contained the updated information on VITA sites. The website is: www.unitedwayofNENY.org. SEFCU, a credit union partner, gathered all of the updated information on the VITA sites and made this available in large quantities for distribution as well as to the United Way website. All VITA sites and financial education workshops were advertised through CA\$H Coalition members such as the Department of Social Services (DSS), Office of Temporary and Disability Assistance (OTDA), as well as banks, credit unions and community-based organizations.

March was also declared March 2007 Developmental Disabilities Awareness Month by the Governor of New York, Eliot Spitzer. A copy of the Proclamation is enclosed. Plans are underway for next year to coordinate this proclamation with VITA/EITC publicity.

An extensive internal marketing campaign to disability organizations in the Capital District publicized VITA/EITC sites and financial education programs for individuals with disabilities and their staff and families. State associations, such as Self-Advocacy of New York State, and provider agencies also distributed the information widely with explanation and support.

c.) Provide description and impact of REI Tour disability workgroup and partners and roles:

The disability workgroup established through this grant includes individuals with disabilities, disabilities organizations and representatives from a variety of public and private agencies. Additional individuals will be invited to join the group in the coming year. Approximately 15-20 members will be included in the development of strategic direction, events and activities.

The disability workgroup has already identified areas of need for next year. Increased support from United Way for the infrastructure of the Coalition will facilitate the strong coordination and collaboration of agencies to promote services and programs for individuals with disabilities. The disability workgroup, a sub-committee of the Coalition and chaired by Wildwood Programs, is ready to go forward with efforts to increase access of services and programs to individuals with disabilities.

The re-structuring of the CA\$H Coalition will be complete by June 2007 and provide for more streamlined and efficient administration of the Coalition and easier identification of Coalition members to work together on a specific issue, e.g. asset-building and financial education.

A major addition to the current grant is the development of a simplified financial education program, written at a lower literacy level and including more visual symbols, larger-type font and practical examples for each topics covered. This program could be used individually, in small groups or with staff and families that serve individuals with disabilities. Individuals with disabilities will assist in the development of the program and CA\$H Coalition members have agreed to field-test the program. Research and websites on existing financial education programs, such as the current Money Smart program for individuals with disabilities, will be included. The program will be posted on the website that was created for the CA\$H coalition by the United Way.

- d.) Any data you have collected about the number of people with disabilities filing or any other data would be greatly appreciated when available.**

The CASH Coalition of the Greater Capital Region exceeded all goals for tax returns this year. I have enclosed the results on an excel spreadsheet for your information. These include all returns completed and EITC results. All sites did not use the Disabilities Survey this year and thus we do not have an entirely accurate figure for the numbers of individuals with disabilities whose tax returns were completed at regular VITA sites. Informal indications from Coalition members indicate that a large percentage of individuals cannot read, need a variety of forms of assistance (re: accommodations) and may not be formally diagnosed with a disability. Many individuals did not self-disclose their disability for the survey as well. While this remains an issue for the current filing year data collection, several methods of addressing this data collection problem have been proposed for next year.

The current data available from our local IRS partners show about 35 tax returns completed at the special VITA /EITC Days for individuals with disabilities. Additional tax returns were completed for individuals with disabilities at other sites that were open to the general public, however, data collection methods were imprecise and did not reflect the true number completed. For example, one site reported 15 tax returns completed with individuals from a group home for developmental disabled individuals as well as their support staff.

Exact numbers are not available, but each site coordinator self-reported that they felt that a good percentage of individuals whom they served had a disability, particularly from our DSS and ODTA sites. A completed addendum with the exact number of tax returns completed will be sent as soon as IRS completes the totals.