



**Building a Better Economic Future
for
Americans with Disabilities**

*Supplement to the
2007 - 2008 Real Economic Impact Tour
Annual Report*

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HIGHLIGHTS FROM Non-Funded REI TOUR CITIES 2008

Anchorage, AK

In the initial year of Anchorage's Disability Initiative, contact was made with a number of agencies and organizations serving those experiencing disabilities. A Disability Program Navigator with the Alaska Department of Labor took the lead in convening a planning session and inviting other organizations to participate. This Disability Workgroup had a brainstorming session, and decided that they would like to focus on Financial Literacy for youth with disabilities. The plan is to develop a series of classes for these youth and their families that would present information on a variety of topics, from budgeting to renting an apartment to savings/asset development. A survey was developed, using the Survey Monkey web site, to collect information about the financial literacy programs already in use and to verify that a need exists for this kind of program. The survey has been sent to agencies and organizations that work with youth with disabilities. In addition to this workgroup's focus on financial literacy, each agency involved has been added to the volunteer site email distribution list and has received information on EITC and other tax issues to pass on to their clients.

Appleton, WI

Goodwill of North Central Wisconsin continues to be a major partner in free tax preparation and outreach in the Appleton/Menasha area. The Goodwill Coalition includes AARP, the Wisconsin Department of Revenue, the University of Wisconsin – Fox Valley and the Lake View Credit Union. Over 1,500 returns were prepared at this busy site with the majority of them electronically filed. The numbers for this coalition are staggering. Refunds totaled over 1.1 million dollars and EITC was over a third of that. They were a major partner in promoting the Economic Stimulus Payments to the Goodwill employees who received special flyers with their March payroll checks and statements. This Goodwill is a unique campus site which houses many organizations under one roof. Their Community Center is the culmination of a \$2.4 million capital campaign started in 1993. Goodwill Industries of North Central Wisconsin formed partnerships with several other organizations dedicated to helping people with disabilities in the community lead better lives. Today, the award-winning concept is the center of a "one-stop shop" environment for human services where people can receive medical care, a variety of employment and training services, information and referral, placement services, as well as the opportunity to donate and shop at Goodwill itself.

Birmingham, AL

The 2008 Filing Season was Birmingham Territory's first year participating in the national initiative. The city of Birmingham is the target city. However, the territory marketed the program to all partners across the states of Mississippi and Alabama. During the site coordinator training sessions we included information on using the Preparers Use Field in TaxWise software to capture the data to gather information from all of our partners for the Disability Initiative. The Territory Disability Initiative efforts included several new and existing partners preparing returns, providing outreach and financial education. To date, for the city of Birmingham, Goodwill, Easter Seals, Independent Living, United Way of Central AL, Mobile CAA, AARP, Veterans Administration, and United Cerebral Palsy have been dedicated to serving those with disabilities. Our first major event with the Disability Initiative here in Birmingham was an annual three-day Preschool Conference and Disability EXPO with over 4,000 in attendance, hosted by United Cerebral Palsy

(UCP) of Alabama in November. We participated on a panel which focused on resources available in the community to assist individuals with disabilities and their families. UCP, Social Security Administration and Independent Living Resources jointly provide the Ala-WIN program of Central and Northern AL. We partner with them to provide outreach and site information to clients. Some of our partners in the Birmingham area that provided free tax return preparation to 503 taxpayers with disabilities included AL Asset Building Coalition, AARP and Impact Coalition Smithfield Library. To date, our partners outside the Birmingham area provided free tax return preparation to 2,064 taxpayers with disabilities. The Operations Manager with United Way of Central AL gave financial information to representatives from local Disability agencies during a meeting held at the Alabama Department of Rehabilitation Services in February. He covered information regarding matching funds for IDA's. These funds are available to all low income taxpayers that qualify. Goodwill Easter Seals of the Gulf Coast's hosted a free tax preparation site at their Springhill location in Mobile during the 2008 filing season. Volunteers reached out to people with disabilities to provide help with over 300 Economic Stimulus Payment returns. Selma Disabilities Advocacy was also a first year site located in The Black belt Area of the state that provided free tax return preparation to 45 taxpayers with disabilities. In an effort to assist persons with disabilities and organizations that serve them, three key partners were identified in Mississippi: The G. V. Montgomery VA Medical Center in Jackson, Mississippi has hosted a VITA for many years and offered free tax assistance to veterans. VA social workers referred veterans to free tax preparation sites to determine if they would qualify for any tax benefits. Publication 3966 was used in this process. More than 300 individuals received educational assistance during the filing season. The Mississippi Partners for Informed Choice (M-PIC) is a project of the Mississippi Department of Rehabilitation Services (MDRS). This organization provides work incentives and assistance services to individuals receiving Social Security Disability Insurance (SSDI) and/or Supplemental Security Income (SSI) benefits. MDRS serves as a major partner under the Disability Initiative. MDRS counselors educate individuals with disabilities on available tax credits and free tax help. More than 1000 individuals have been reached through this outreach endeavor. In addition to preparing over 81 returns the VA Medical Center site coordinator hosted a One day ESP event at the Walthall Public Library, Tylertown, MS. More than 120 ESP returns were prepared. In Jackson, MS volunteers reached out to veterans on Super Saturday to help 20 veterans.

Boise, ID

The Arc shelter in Boise hosted a free tax preparation day for its clients and employees who qualified for the service. AARP Tax-Aide volunteers, with the help of Arc counselors, assisted The Arc clients during a special day set aside at the shelter. 22 clients were assisted. The Idaho Independent Living Council and The Americans with Disabilities Act Task Force office continue to work together to provide tax credit and free tax prep site information to the disabilities organizations that they work with around the state. The Community Action Partnership Association of Idaho has developed an EITC presentation that is being delivered to the staff in each of their offices around Idaho in addition to Idaho Department of Health and Welfare staff and other disability service organizations. The Boise City Mayor's Office provides the site for the Coalition for Economic Improvement VITA program. They also provided all their low-income housing clients

with information about the free tax preparation service and the EITC. WIPA distributed packages to their clients that included IRS publications about tax credits and free tax return preparation services. The Coalition for Economic Improvement (CEI) Disability Subcommittee, along with the Partners for Prosperity coalition in eastern Idaho worked to promote a Disability Day on March 13, 2008. Six AARP Tax-Aide sites and one VITA site were listed, along with the Idaho CareLine Number, as locations offering services on the Disability Day Free Tax Preparation event. Total reported from the targeted sites: 101 individuals assisted, 15 claiming to have someone in the household with a disability. That is 15%. Last year, the Coalition surveys revealed that 12% of the taxpayers served at the two coalition sites had someone in the household with a disability. Idaho AARP Tax Aide program tracked the number of individuals with disabilities that used their free tax prep sites. 1,042 clients identified themselves or a member of their household as a person having a disability. The CEI VITA sites identified 112 clients in that community.

El Paso, TX With the Economic Stimulus Payments underway, El Paso is eagerly trying to establish a working relationship with the VA hospital to assist veterans. Already have a function set up by end of May with the Dept of Veterans Affairs Readjustment Counseling Service. Distributed outreach material (Pubs 3966, 962, 396 & 1762) to our four El Paso organizations before and during filing season to capture the Disability audience.

Flint, MI The Disability Program Navigator (DPN) joined the Genesee County Tax Preparation and Financial Services Disability Sub-Committee this year. The DPN and other coalition partners distributed information on EITC, tax credits, and asset building opportunities. A local credit union hosted a one day site for the hearing impaired. University of Michigan (Flint) accounting students along with interpreters volunteered at the site. The coalition held the second annual Asset Building Day on April 5, 2008. Several vendors including Goodwill Industries, The Disability Network, local banks and credit unions, The Resource Center, United Way and Metro Housing sponsored tables at the event. Goodwill Industries gave a presentation on how to use "programs in the community to help utilize tax refunds and credits to change your life" and the Disability Network provided demonstrations on assistive devices. The flyer listing the coalition sponsored VITA sites indicated that all the sites would be accessible to persons with disabilities. The coalition sponsored sites in Flint prepared 447 returns which was an increase of 31% from last year. The coalition had set a goal of a 10% increase for this year. It is possible the large increase was due to the ESP returns. The coalition plans to increase the number of partners in the disability sub-committee next year. The increase in partners will result in an increase in the outreach efforts and the number of returns prepared for persons with disabilities. The plan is to increase the number of returns by 20%.

Honolulu, HI The Honolulu City Disability Initiative is in its third year of providing a stronger emphasis on promoting products and services for persons with a disability. The Hawaii Asset Building Coalition (HABC) sites continues to offer free tax preparation for persons with a disability and gather statistics. Some of the HABC site partners such as Goodwill, Oahu WorkLinks, Hawaii Centers for Independent Living, and Ho'Opono have disability programs which shared Disability Life Cycle brochures and offered free tax preparation services for their clients. The Oahu Center for Independent Living scheduled appointments, offered translators, and tax

preparation site space for hearing impaired clients, for the first time, this year. Ho'Opono continues to schedule appointments and offer tax preparation site space for visually impaired taxpayers. The Oahu Veterans Center provided tax preparation site space and assisted with promoting free tax preparation assistance to two hundred (200+) groups and organizations who help veterans. An overall productive year and stepping stone for future activities!!

Indianapolis, IN Indianapolis has more than 15 partners engaged in the local Disability Initiative (DI). Although there has been no formal DI workgroup established, Indianapolis SPEC staff helps coordinate local and state-wide DI Education & Outreach, Free Tax Preparation and Financial Literacy/Asset Building strategies. Indianapolis has focused on integrating specific DI information and materials into all appropriate educational/outreach and tax preparation opportunities. Specific 2008 successful Education & Outreach actions targeted to the disabled community included providing EITC, Disability Initiative materials/publications to organizations either directly serving the disabled community and their families throughout Indiana or whose staff has direct contact with persons with disabilities and their families (LifeStream, Work Incentives Planning And Assistance (WIPA), Indiana Institute on Disability and Community, etc.). In addition, Indiana SPEC staff worked with the Indiana Institute on Disability and Community to train more than 130 benefit counselors in the latter part of 2007 (each of whom interface with a minimum of 80 clients annually; another 150+ new benefit counselors will be trained during sessions in 2008) on EITC, the interaction of EITC with other government benefit programs and DI issues. EITC and DI materials have been incorporated into the Benefits Information Networks Training Program's written course materials used for benefits counselor training throughout Indiana. Economic Stimulus Package information was provided to all partner organizations, particularly those serving persons with disabilities. During the 2008 filing season, IABC and its partner sites prepared more than 923 tax returns for clients who identified themselves as persons with disabilities; many of these returns were ESP returns. Other Indiana partners prepared another 1,156 tax returns for persons who identified themselves as persons with disabilities for a total of 2,079 tax returns prepared this filing season for the disability community. Indianapolis has partnered with Goodwill, Noble Centers of Indiana, Homeless Veterans, Indiana Legal Services, Crossroads Rehabilitation, Midtown Mental Health, Clarian Health Partners and Citizens Gas Company to provide targeted free tax preparation services to the disabled community. Financial Literacy outreaches and seminars were conducted by partners in more than 60 of Indiana's 92 counties.

Little Rock, AR We are continuing to work with designated partners in Arkansas to reach out to those with disabilities by partnering with organizations that provide outreach, education and return preparation to the disabled community. Arkansas Rehabilitation Services is a division of the Department of Workforce Education. They have been charged with providing opportunities for Arkansans with disabilities to lead productive and independent lives. Each year we provide them with the disabilities brochure and EITC information for those with jobs. This year we included information on the Economic Stimulus Payments so they could educate their clients and assist with their returns. Pathfinder is a private, non-profit, community based organization which provides an array of services including: Preschool Services, Residential Services, Waiver Services, Adult Training Programs, Employment Contracts, Mental Health, Supported Employment, and Transportation.

They sponsor a VITA site to prepare returns for those clients they place in jobs. RSVP in Northwest Arkansas reached out to 3 agencies that provide services to the developmentally disabled. They also worked with community mental health clinics in six surrounding counties, the VA, 13 senior centers and several hospitals to provide information on the Economic Stimulus Payment. These outreaches resulted in 778 returns prepared for those with disabilities.

Louisville, KY The Louisville Asset Building Coalition (LABC) oversees the Disability Initiative in Louisville, Kentucky. For filing season 2008, they established a partnership with the Center of Accessible Living (CAL). CAL agreed to host a VITA site utilizing their employees as Sign Language Interpreters, tax preparers and setting up appointments for their clients. They completed 5 paper returns and 39 e-file returns which resulted in \$16,132 in EITC and \$34,642 in refunds. LABC staff went to 4 assisted living apartment complexes and prepared approximately 150 ESP returns. Based on data gathered by the LABC staff and the VITA sites using the preparer use fields in TaxWise, 6,840 people answered the disability question – “Does anyone in your household consider yourself to have a disability?” Out of the responses, 1,395 answered the question "yes". United Way is an active member of the Advisory Board of LABC. As such, their continued support and involvement has been instrumental in developing and distributing marketing materials, conducting media and non-media outreach events, recruiting volunteers and routing taxpayers to their "211" line for referral to one of the free tax preparation sites. The Mayor's Office is also a member of the Advisory Board of LABC and their continued support and involvement has been instrumental in developing and distributing marketing materials, conducting media and non-media outreach events and recruiting volunteers.

Madison, WI The Madison VITA Coalition led by Wisconsin Department of Revenue and University of Wisconsin Extension (The Financial Education Center) will continue their outstanding efforts to reach out to the disabled community. The Coalition participated in the National EITC Day kickoff. Wisconsin Department of Revenue partnered with SPEC in producing a Webcast on their website to educate people state-wide on the details of the Disability Initiative. This will get the word out to more and more people and organizations. Wisconsin Council for the Blind is a new participant this year which should greatly enhance our efforts to reaching out state-wide. The super-site in Madison will continue to support the same disabled customer base in central Wisconsin with volunteer tax preparation. This includes Goodwill, Access to Independence, Community Living Connections, The Arc, and REM Inc. Goodwill of North Central Wisconsin will continue to be a major partner in tax preparation and outreach. Their coalition includes AARP, University of Wisconsin-Fox Valley and Lake View Credit Union. The coalition is committed to build on their successes and reach out to more taxpayers in the Fox Valley region. The Middleton VA Medical Center of Madison and the Tomah VA Medical Centers will again provide VITA for veterans with disabilities. The new procedures for the Compensated Work Therapy (CWT) payments will require increased outreach to disabled veterans.

Memphis, TN The Nashville Territory met with 13 Disability Program Navigators (DPNs) during their annual training session held in Nashville, TN. A visual introduction to SPEC's Disability Initiative was presented and assistance offered to each DPN to promote the DI in their assigned counties. The Territory continues to

maintain a stakeholder relationship with the DPNs in support of TN DPN activities. DPNs continue to distribute Pub 3966, Living and Working with Disabilities, to clients. Tax Consultants served as presenters and exhibitors during the Disability Road to Freedom Tours which were held in Memphis, Jackson and Knoxville, TN. Over 300 persons with disabilities participated in these city tours. They also participated in the GO Fest of Chattanooga, TN, which consisted of 39 exhibitors from agencies that market information and supplies for persons with disabilities.

Miami, FL

Efforts to educate taxpayers and families with disabilities were a success. Several partners conducted outreach and distributed 7,800 copies of Publication 3966. This is a notable increase from figures reported last year (1,990). The organizations who participated were: Goodwill South Florida, Center for Independent Living, Miami-Dade County Public School System – Division of Special Education, Miami-Dade County Community Action Agencies, South Florida Work Force, Lighthouse for the Blind, and Miami-Dade College ACCESS-MEED. Goodwill Industries South Florida hosted a leveraged VITA site at their main office in the City of Miami. GI was very instrumental in the distribution of 4,000 copies of Publication 3966 to all of their stores (40) in Miami-Dade. The site was staffed by University of Miami law students. The volunteers were highly successful in not only preparing returns, but in answering tax law questions for employees, clients and families with PWD. The site generated 65 returns filed for PWD. T-T-T session was held with GI staff that recruits employers who hire PWD. The latter will continue during the post-filing season. Center for Independent Living (CFIL) hosted a leveraged VITA site that offered an ASL interpreter. CFIL sent an electronic version of Publication 3966 to their network of partners who serve the disabled community. The territory is actively working with organizations that provide customized employment services to youth and adults with disabilities. One pilot program that is underway in Miami-Dade County is the Broadened Horizons Brighter Program (BHBP). BHBF, operated by Abilities of Florida, is funded by the Social Security Administration. BHBP works with traditional and non-traditional partners to provide this service to youth with disabilities within one year of high school graduation. They will be having their Youth Transition Demonstration Project Kick-Off Event in mid-May.

New Orleans, LA

This is the first year for the disability initiative in New Orleans and we are proud to note that this initiative has taken off with great support from local partners. Partners have been developed and other National partners have welcomed our tax preparation opportunities within their organizations. Focus has been on ensuring that we capture returns prepared for those with disabilities. All site coordinator training listed a caveat that ask tax preparation sites to code via preparer use fields a “yes” or “no” if taxpayer or dependent was disabled. Data received thus far reflect 675 AARP and 311 VITA returns identified as disabled for this project. Several “site specific” Outreach Tax Preparation events were conducted throughout the State. Goodwill Industries sponsored a Free Tax Day in Shreveport and it was a great success! The efforts of the Goodwill personnel department was a main reason this event was such a success. They used the process of holding the client’s W2 until the scheduled appointment for the day. This allowed for an easier flow and insurance that all required documents were present at tax preparation time. The client at this job rehabilitation centers were grateful for this event as it also served as an educational fair with many client changing their W-4 withholdings and Advance EITC W-5’s. Additionally, the same type of event was held in New Orleans at the

local Volunteers of America Center, where our partner Louisiana Department of Revenue prepared over 60 returns for clients and staff personnel. The New Orleans Territory continues to network with the Mayor's Advisory Council for Citizens with Disabilities to ensure that VITA and Outreach are part of the "rebirth" efforts within the disabled community. The local TC conducted a training session on the Stimulus Returns Process ensuring that those on disability income are aware of this payment. Board Members attending these meetings come from a variety of influential agencies i.e. Lighthouse of the Blind, LA Rehabilitation, Regional Transit Authority and the Governor's Office of Disability Affairs. WRBH a local radio station for the blind has partnered with IRS to provide local broadcast of tax issues relative to important issues suiting their cliental. Issues identified for these broadcast are Taxpayer Advocate Criteria, Important Tax Changes for 2007 and Louisiana State Issues. And recently the local TC, spoke on the "Public Affairs Hour show about the stimulus payment.

Newark, NJ

The Newark territory has added several partners to the Disability Initiative and has initiated contacts to increase the amount of active partners. Peter Stahl the Director of Economic Development at Community Enterprise Corp in Freehold New Jersey which works with the mentally challenged has 23 VITA sites and processed 150 returns this year. They also helped many claim their Earned Income Tax Credit and Economic Stimulus Payment. As a volunteer group they went beyond just processing tax returns they achieved an identity and an affinity for their specialized group that goes beyond the borders of the departments, the divisions, the region and the organization from where they came. Doors have opened for Newark territory from the Department of Veterans Affairs office Homeless Outreach office right in our building. I have made a contact with Roberto Guerrero. The Goodwill of Burlington Co. will be joining our VITA program and they will also do outreach for us. I am in the process of contacting the Mayor of Newark the United Way of Burlington Co. and the Blind /visually impaired.

Oklahoma City, OK

The Metro disABILITY Resource Alliance had their second annual service employee conference where sessions began with a panel of service agencies explaining services available and how to initiate contact when a child is born with disabilities. Sessions continued with different panels to explain services available from early childhood through high school into adulthood and retirement. The conference included booths for service providers. The conference had 91 participants from the Oklahoma City area and over 25 exhibitors. The Alliance held their second disABILITY Resource Fair for individuals with disabilities in March. This event was held in a business mall with over 600 participants and 75 exhibitors which provided information from IRS, SSA to the availability of service dogs. Several High Schools brought their students with disabilities. The IRS booth distributed EITC information and stimulus returns. In addition, IRS AIMS VITA provided return preparation. Two retired IRS employees were the volunteers. Presentations were made to over 150 Oklahoma Department of Human Services, Developmental Disabilities Services Division (DDSD) caseworkers in Area 1. Due to bad weather in March, Area 2 presentations were rescheduled to this fall when EITC will be more relevant. Another presentation was made to DHS Client Advocates. EITC presentations were also given at the Governor's Conference on Developmental Disabilities and the Oklahoma Association for Persons in Supported Employment. The presentations and booths included Stimulus information along with EITC. SPEC

included the Taxpayer Advocate Service in each presentation in an effort to assist in their Disability Initiative. Outreach was a combined effort of EITC and Stimulus marketing since many people with disability met the exception for the Stimulus. Members of the Metro disABILITY Resource Alliance distributed EITC and Stimulus information to employees and clients. The Governor's office of Disability Concerns posted the VITA site list on their Web site. Presentations for EITC and Stimulus were made to the Homeless Alliance and Shelters Coalition. WIPA, Community Action of Oklahoma City and IRS gave Financial Literacy Training to People First which is a group for people with developmental disabilities. Stimulus and Taxpayer Advocate information was also included. In Oklahoma City, outreach for people with disabilities was 21,327 which included information on the Stimulus Payment.

Omaha, NE

Ed Leahy from the Omaha EITC Coalition attended the January Mayor's Commission on Disabilities. He spoke to them about the Omaha EITC Coalition and its goals to reduce the poverty level of persons with disabilities through claiming tax credits and better financial planning of refund use. The Commission has a link on their website for information on these goals. The meeting was taped then presented on the educational cable channel at a later date. A video of that meeting can also be accessed on the web site. This summer there will be five sessions on managing personal resources and improving informed decision making about credit and savings. The Coalition's VITA Site, Girl's Inc, set aside the first week in March to focus on doing returns for persons with disabilities and mobile clinics were made available for agencies that might be interested in having the tax preparers come to their sites. The Coalition decided that they will probably not have a special week set aside next year, but will continue to include persons with disabilities in the day to day outreach to the community.

Pittsburgh, PA

In the past year the Pittsburgh territory has made contact with the Executive director of the statewide Center for Independent Living and had contacted all seventeen district organizations. Two had expressed interest in establishing VITA sites; one was unable to follow through but the CIL in Pittsburgh worked as an ad hoc site and completed 28 returns. Our partner UCP has operated a free tax site for PWD for two years and has completed 90 returns this year using the Benefit Bank program. They are remaining open for filing ESP returns until the deadline of October 15th. Our AARP partners have operated an AARP Tax Aide site at the Butler VA hospital. The Cindy Dearolf Home site prepared 5 out of 79 returns for PWD and Westmoreland Human Opportunities prepared 19 out of 246 returns for PWD

Providence, RI

The Veterans Administration of RI held a special ESP Day in their Bristol Veterans Home for Homeless Veterans. Most of these Veterans have a disability. They advertised the event in the Providence Journal, Bristol Phoenix, the East Bay News and the local radio station WPRO which aired it several times. They also advertised it internally to the Vets Center, the Vietnam Vets, Disabled Vets, the Veterans Halls and the Legions posts. They have been assisting Disabled Veterans with preparation of ESP returns and letting them know about the United Way 211 number if they need to file a regular tax return. They have posted an ESP article in all their Veterans papers, and have discussed further outreach at their meeting in Florida. Spurwink had a meeting with a group of 50 clients that have a mental and/or physical disability that they assist with finding and maintaining work. In-Sight has

assisted with outreach and education by playing informational tax news on the In-Sight Radio Station. In-Sight advertised info on ESP, EITC, Filing Requirements, Free-file/E-file, etc. They were able to reach 2500 people with each show. Network RI held monthly workshops to educate their clients on EITC, how to complete a W-4, Daycare Credit, Child Tax Credit, VITA, E-File, ESP etc. Each month they receive a new batch of clients which they try to schedule into this training. The Alliance for Better Long Term Care held a seminar for the Nursing Homes to teach the staff how to prepare ESP returns. They also sent the information on ESP to 92 Nursing Homes/Assisted Living Centers in RI. The Arc Agencies in RI are very helpful in reaching out to the people they assist. They distribute EITC, ESP, Efile, Life Cycle for DI and VITA/TCE Info to the people on the staff and the families and individuals that use their services. Some of The Arc Agencies provided transportation to the VITA sites for the free tax assistance. The RI Parent Information Network helps families who have children with a mental or physical disability. They help parents get the assistance the children need and advocate for services. They included the VITA and EITC information in a Disc that they are distributing to parents in the communities in RI. The Governor's Commission on Disabilities posted the VITA/TCE information on their website for people looking for assistance.

Richmond, VA A new state-wide partnership – Virginia Disability IRS Partnership (VDIP) was formed in October 2007. This is a statewide partnership with the 14 Virginia Disability Program Navigators to increase awareness of the IRS SPEC Disability Initiative and disseminate information at the state and local level. VDIP has expanded to include the Virginia Mental Health, Mental Retardation, and Substance Abuse Services, Virginia Department of Social Services, Virginia Board for People with Disabilities, and Virginia Department of Social Security.

Rochester, NY The Tax Consultant worked closely with the Director of the Rochester C.A.S.H. – Creating Assets, Savings and Hope Coalition and the Disability Program Navigator (DPN) for Monroe County to get federal income tax information to persons with disabilities. The Rochester C.A.S.H. Coalition assisted 14,463 households of which 1,880 free tax returns were prepared for persons with disabilities through its three Super Sites and ten Partner sites. In addition, Rochester C.A.S.H. Coalition outreach brochures were distributed to about 5,500 persons with disabilities. Rochester C.A.S.H. Super Sites and Partner sites provide more than free tax preparation. Every client who takes advantage of Rochester C.A.S.H. free tax preparation services meets with a “C.A.S.H. Advisor” prior to having their tax return prepared. During the meeting with the C.A.S.H. Advisor, financial asset building strategies are discussed along with potential public programs that the client may be eligible for based on their personal situation. The client also has the option of having a free credit report printed and then reviewed with an employee from a financial institution volunteering at the site that day. Volunteer Legal Services Project (VLSP) of Monroe County, Inc. has received an IRS Low Income Tax Clinic (LITC) grant for the second year for services for the deaf and hard of hearing. They provide free legal help for the deaf community to help resolve problems with the IRS. VLSP purchased Interprettype last year to help communicate with deaf and hard of hearing clients. New partnerships were established with three Veterans agencies primarily due to Economic Stimulus Payment Outreach. Contacts were made at Veterans Outreach Center, Inc., Veterans Service Agency, and Vet Center. All agencies were not only

informed about Economic Stimulus Payments, but also about the services offered by the Rochester C.A.S.H. Coalition.

Sacramento, CA Sacramento Territory continues in its DI program mostly in the area of outreach. Continuing outreach partners include: Easter Seals, Goodwill, United Cerebral Palsy, The Arc, PRIDE Industries, Resources for Independent Living, Sacramento Employment and Training Agency and Alta California Regional Center. The Sacramento County Department of Human Assistance prepared 344 returns including persons with a disability in the household. It is hoped in the coming year to add more DI outreach partners, have existing and new partners increase outreach efforts, and capture DI return count with more SPEC partners.

Salt Lake City, UT Salt Lake had 4 DI VITA sites this filing season, and several outreach partners. There has been preliminary discussion with the VA about having an ESP/tax prep/outreach day or several days in Ogden and Salt Lake before the end of the summer. There has also been discussion about possibly having the DI kickoff in September or October. This would really help the initiative take off in Salt Lake.

San Jose, CA San Jose Initiative Collaborative has been engaged in local EITC/VITA/Disability Campaigns for the past four years with Catholic Charities leading the disability subgroup through their Handicpables Program. They provide economic, family, and emotional stability to individuals with special needs through outreach activities and free tax preparation services. Catholic Charities merged the VITA/EITC outreach into the Handicapables Program as part of their educational programs for seniors and adults with disabilities. They recruit their own volunteers and place them throughout the 4-sites they host. They have on-going educational workshops and schedule train-the-trainer workshops for staff on tax credits available to the disabled community. Meetings will be held over the summer to develop strategies to reach more individuals and plan for next filing season. Hope Services are actively involved in disability outreach and host special workshops for their trainers and support specialists on EITC and general disability outreach. They conduct special one-on-one outreach with their disabled working clients via Community Living Services and Employment Services. In Monterey the Alliance on Aging in collaboration with the Monterey Consortium coordinated an outreach campaign to reach low-income households, elderly, disabled, and the veteran community. Their campaign includes working with the Central Coast Center for Independent Living. They incorporated free tax preparation and outreach into their existing services to reach the disabled and veteran community. They recruit their own volunteers and set up homebound free tax assistance through the TCE Program. The Santa Cruz Collaborative in partnership with Santa Cruz Community Credit Union (SCCCU) and Santa Cruz County Human Resources Department (HRS) conducted outreach efforts and tax preparation services in the coastal region of the territory in conjunction with Project Scout. The Collaborative coordinated EITC/Tax Prep outreach campaigns to target low-income disabled community residents and seniors via the food bank. They recruited volunteers for placement throughout the 5-sites hosted by Project Scout. The Collaborative worked with the Seniors Council to advertise the free tax services in their newsletter with special emphasis to the home bound disabled and seniors. New accessible sites were established in Watsonville and Santa Cruz to better serve the disabled community.

Meetings will be held over the summer to develop strategies to reach more individuals and plan for next filing season.

Seattle Activities included contacting various organizations that serve persons with disabilities. Organizations contacted include Goodwill, The Arc of Washington State, Easter Seals of Washington, Disability Rights Washington, Washington State Developmental Disabilities Council. All of the above were invited to participate in the REIT calls and were given information on the Disability Initiative. Most if not all were surprised that the IRS was involved in an undertaking of this kind and also did not always think there was a fit for them. Many organizations that serve the disabled fall under the United Way umbrella and as a result, these targeted populations do get served. As part of the ESP effort, five veterans organizations were contacted directly. Each was given packages of flyers and was sent the pdf. Each contact stated that they would post the information at each of their offices, posts and lodges. The Washington State Department of Veterans Affairs hosted a training seminar for Volunteer Service Officers that work with disabled veterans. Time was allotted for a short presentation on ESP to this group of about 120 Volunteer Service Officers.

Springfield, MA Springfield Partners for Community Action is an active partner assisting taxpayers with disabilities filing free-of-charge tax returns providing outreach material to clients and offering Development Individual Assets Building classes to people with disabilities who are currently working. During the 2008 filing season, Springfield Partners for Community Action was able to recruit two additional sites to operate as a free-tax-center preparation for people working with disabilities. 530 total returns were prepared at all 3 sites. Additionally; over 1000 brochures were distributed, mostly to reach disabled taxpayers in rural areas. Furthermore, this Organization provides assistance to Limited English speaking population. According to the city census, 75% of the population speaks Spanish. Finally, this partner has extended an invitation to Goodwill to attend the disabilities meetings.

St Louis, MO The Tax Consultant has begun working with the VA on a couple of projects. She spoke with a group of vets at the VA Medical Center in Columbia, MO and was invited to give presentations on ESP, EITC, etc. TAS also attended to speak about issues that would warrant the advocates help. SPEC attended a Stand Down in St. Louis during May. We will also be attending a Welcome Home Celebration on May 17th. The American Legion has been very active speaking on and distributing information on Economic Stimulus. Gateway EITC Community Coalition (GECC) has plans to continue the relationship with MERS/Goodwill and provide the same service as in the past four years. The City of St. Louis partnered with GECC to provide signers at two Super Saturday events. They have also stated they would distribute EITC flyers to drivers with disability stickers.

Syracuse, NY The Tax Consultant has worked closely with People's Equal Action and Community Effort (P.E.A.C.E.), Inc., the leader of the Syracuse EITC: You've Earned It! Coalition, and the Disability Program Navigator (DPN) for Onondaga County to get federal income tax information to persons with disabilities (much of which involved the Economic Stimulus Payment this filing season). New partnerships were established with three Veterans agencies primarily due to Economic Stimulus Payment Outreach. Contacts were made at Military Order of the

Purple Heart (VA Medical Center), Department of Veterans Affairs and Veterans Service. All agencies were informed not only about Economic Stimulus Payments, but also about the services offered by the Syracuse EITC: You've Earned It! Coalition. Information was shared with these three partners about ESP for the remainder of the filing season and into the post-filing season.

Tampa, FL All of the Prosperity Campaign of Hillsborough County's tax sites are accessible to those with disabilities. The various members of the coalition participate in the distribution of outreach materials to the community. This filing season a number of direct outreach presentations have been made to disability organizations in Tampa regarding the Earned Income Tax Credit and the Economic Stimulus Payments. A meeting was held with Workforce Alliance in Tampa where it was learned that they had recently hired a new Disability Navigator. TC has been in contact with the Navigator who appears most willing to assist in SPEC's endeavors in Tampa. It is anticipated Tampa will become more involved in the coming months in the Disability Initiative.

Traverse City, MI Goodwill Industries of Northern Michigan will continue to be a partner in the Northwest Michigan Tax Coalition. This was the first year that Goodwill Industries hosted a tax preparation site. There were 100 returns prepared for people with disabilities at this site. Goodwill Industries, United Cerebral Palsy, and the Disability Network will distribute information on EITC, other tax credits, direct deposit, and various other asset building opportunities. Northwest Michigan Human Services Agency (NMHSA), lead the Northwest Michigan Tax Coalition and invited AARP as a new partner agency in this year's effort. Not only did NMHSA increase tax preparation services to include over 25 sites, efforts were increased in providing services to people with disabilities and outreach efforts to partners who serve people with disabilities. These partners include: Disability Network of Northwest Michigan, Community Living Centers, Great Lakes Community Mental Health, etc.

Washington, DC On Saturday, January 12, three tax consultants participated in the Winterhaven Stand Down for Homeless Veterans at the VA Hospital in Washington, DC. The VA sponsors several of these events each year and has held them for over the last decade. However, this was the first year with members of SPEC participating in the event. The staff from SPEC, Field Assistance, and Media and Pubs along with VITA trained members from Andrews Air Force Base serviced 256 customers and prepared 41 prior-year federal tax returns for homeless veterans. SPEC partnered with HUD in this Annual Event and we are comfortable in partnering with them for future Stand Downs. W&I SPEC Area 1 Director, Peggy Gavaghan, and Senior Tax Consultant, Anita Carter, from the Washington, DC Territory attended the Economic Stimulus Payment event at the Armed Forces Retirement Home on March 29, 2008. The mission of the Armed Forces Retirement Home is to fulfill our nation's commitment to its Veterans by providing a premier retirement community with exceptional residential care and extensive support services. Commissioner, Douglas Shulman was in attendance to greet residents and thank the volunteers. The media also interviewed a number of the taxpayers as well as filmed the volunteers preparing ESP returns

Winston Salem, NC The Forsyth Working Family Partnership (FWFP) opened its first VITA site that targets people with disabilities at The Adaptables. The Adaptables is the Independent Living Center for Winston- Salem and seven

surrounding counties. Although only ten returns were prepared this first year at this site the potential is huge since this organization is in contact with approximately five thousand individuals in the surrounding counties. FWFP prepared 609 tax returns at its other VITA sites. The Easter Seals Community Work Incentive Coordinator provided one-on-one counseling with approximately 100 persons with disabilities who were thinking about returning to the workforce. She provided them with EITC and AEITC information.