

# Building a Better Economic Future for Americans with Disabilities



# Building Financial Stability for Americans with Disabilities

National Disability Institute's Real Economic Impact (REI) Tour has helped millions of Americans with disabilities move toward greater financial stability by promoting full inclusion in economic empowerment initiatives. By working for the past eight years with more than 900 public and private partners in more than 100 cities across the country, National Disability Institute's REI Tour has increased access to and inclusion of people with disabilities in asset development, financial education and free tax preparation programs and services, resulting in **more than 1.5 million Americans with disabilities receiving more than \$1.4 billion in tax refunds.**

That's real economic impact for the 1 out of every 5 Americans living with a disability, especially for the 1 in 3 Americans with disabilities living in poverty. Americans with disabilities experience a poverty rate nearly double the national average and among the highest poverty rate for any underserved population in our country. With a presence in all 50 states, National Disability Institute's REI Tour network is producing landmark outcomes to advance brighter financial futures for Americans with disabilities.

## By the Numbers

### OVERALL:

- More than 1.5 million taxpayers with disabilities receiving more than \$1.4 billion in tax refunds since 2005
- 5,316 percent increase in number of persons with disabilities filing taxes through REI Tour VITA sites
- 5,813 percent increase in the amount of tax refunds received by persons with disabilities through REI Tour VITA sites
- 8,286 percent increase in Earned Income Tax Credit (EITC) claims filed through REI Tour VITA sites

### 2011-2012:

- 411,617 persons with disabilities assisted in completing free income tax returns

- \$405.1 million in tax refunds, representing \$58.7 million in Earned Income Tax Credit (EITC)
- \$90 million in saved tax preparer fees
- More than 900 local partners in 100 cities representing all 50 U.S. states
- Reached more than 25,500 contact points through program outreach strategies including webinars, newsletter articles, teleconference trainings, in-person and virtual presentations, trainings and workgroup meetings

### 2011-2012 REI TOUR HIGHLIGHTS

## MyFreeTaxes

Since 2009, MyFreeTaxes has helped millions of low- to moderate-income individuals and families increase their financial stability by providing access to free on-the-ground and online federal and state tax preparation services that not only save them money on preparer fees but also act as a gateway to embed effective alternatives to receipt of anti-poverty programs, including the Earned Income Tax Credit and SNAP (formerly the food stamp program). Begun as a joint project by National Disability Institute (NDI), One



## National Disability Institute

- ▶ The first national non-profit organization committed exclusively to building a better economic future for all persons with disabilities.
- ▶ Launches innovative initiatives to help the 1 in 3 Americans with disabilities living in poverty to move toward financial independence and economic self-sufficiency. Initiatives include the REI Tour as well as more than a dozen forward-thinking collaborative employment, educational, research and training programs.
- ▶ Affects change through public education, policy development, demonstration programs, research, training and technical assistance.
- ▶ Creates systems change by building public and private partnerships with government agencies, businesses, non-profit organizations, financial institutions, universities and research institutions to build capacity and embed disability inclusive practices throughout organizations.

## 8-YEAR REI TOUR SUMMARY — OUTCOMES AND COMMUNITY IMPACT

Year	Cities	Local Partners	Returns Prepared	% Increase	EITC Claims	EITC Amounts	Refunds Received	Tax Prep \$ Saved
2005	11	—	7,600	—	1,710	\$0.7 m	\$ 6.8 m	\$1.5 m
2006	33	200	17,223	127%	3,875	\$1.6 m	\$15.3 m	\$3.4 m
2007	54	355	36,275	111%	8,162	\$3.7 m	\$32.6 m	\$7.2 m
2008	62	555	90,653	150%	20,397	\$9.7 m	\$81.5 m	\$18.1 m
2009	84	634	181,152	100%	40,759	\$19.4 m	\$176.6 m	\$36.2 m
2010	100	710	360,499	99%	81,112	\$38.5 m	\$351.5 m	\$72.0 m
2011	100	>800	397,090	10%	119,127	\$43.7 m	\$387.1 m	\$87.4 m
2012	100	905	411,617	4%	123,485	\$58.7 m	\$405.1 m	\$90.0 m
	<b>TOTAL</b>		<b>1,502,109</b>		<b>398,627</b>	<b>\$175.9 m</b>	<b>\$1.45 b</b>	<b>\$316.4 m</b>

Economy (OE) and United Way Worldwide (UWW) funded by the Walmart Foundation, MyFreeTaxes has helped more than 4.4 million taxpayers receive more than \$5.98 billion in tax refunds since the project began, with the number of filers using MyFreeTaxes.com to submit their taxes online increasing by almost 500 percent in four years, with the number of eligible taxpayers claiming disability who file for free at VITA sites doubling. In 2012, the MyFreeTaxes campaign succeeded by not only exceeding every goal set for the 2012 tax season, but in some categories, *doubling and tripling goal outcomes*, including: 1) helping 1.4 million taxpayers (13.6% with disabilities) save and live better through alignment of effective technology across diverse populations; 2) yielding in \$1.9 billion in tax refunds and \$493 million in Earned Income Tax Credits; 3) saving taxpayers \$292 million in preparer fees; and 4) screening more than 11,000 taxpayers for SNAP (food stamp) eligibility.

### Virtual VITA

**N**ational Disability Institute joined forces with the IRS as well as with United Way of Tampa Bay to conduct a Virtual VITA pilot program in Florida during the 2012 tax season to increase outreach to taxpayers with disabilities. Building off community tax coalition efforts to reach rural taxpayers and NDI's work in spearheading a DeafTax initiative with the IRS that allowed ASL-fluent VITA tax preparers and deaf and hard-of-hearing taxpayers to use sign language to complete their tax returns via videophone, NDI and United Way of Tampa Bay worked with nine community-based organizations serving people with disabilities throughout Northeast and Central Florida to serve as remote intake sites to provide VITA access to persons with disabilities. Virtual VITA clients scheduled appointments with VITA tax preparers at United Way of Tampa Bay and connected with their tax preparer at their appointed time via videoconference from the intake site. Tax documents were scanned and sent through a secured

portal to the VITA tax preparer, allowing the taxpayer to see their tax return being completed in real time, which was then sent back through a secured portal for signature. More than 92 taxpayers used Virtual VITA services, 20 of whom were deaf taxpayers, resulting in \$78,000 in tax refunds and \$35,000 in EITC. National Disability Institute received funding for the pilot from REI Tour sponsor Bank of America.

### VITA Training in ASL to Train Tax Preparers who are Deaf and Hard of Hearing

**N**ational Disability Institute, the IRS and faculty and students from Washington, D.C.'s Gallaudet University, the world's leading undergraduate liberal arts university for the deaf and hard of hearing, collaborated in 2012 to help expand the reach of VITA services to taxpayers who are deaf. For many years, Gallaudet University faculty and students in the business school have prepared taxes for individuals who are deaf and hard of hearing through the university's VITA site and have worked with NDI on the MyFreeTaxes initiative. As their senior project, several students who served as Gallaudet VITA volunteers created a website and worked with NDI, IRS and Gallaudet faculty to create a national training video to offer the IRS's official VITA training in American Sign Language (ASL) to expanding training to help individuals who are deaf and hard of hearing to become VITA volunteer income tax preparers and, in turn, better serve deaf and hard-of-hearing taxpayers. IRS and NDI joined with the Gallaudet faculty and students to bring this project to scale, by offering support and resources to make it available to tax coalitions and the VITA community nationwide to expand outreach to help taxpayers who are deaf and hard of hearing access free VITA services. The students did such a great job on the project, two of them now work for the IRS.

**National Disability Institute would like to thank our 2011-2012 Real Economic Impact Tour Sponsors and Partners. Your support and teamwork make this work possible!**

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