



Prosperity Campaign of Hillsborough & Pinellas Counties

Promoting economic opportunities & financial education

Key Performance Indicators
2004 Tax Filing Season - As of April 30, 2005

The Prosperity Campaign of Hillsborough & Pinellas Counties was established in 2004 through a collaboration of the public sector, private business, and nonprofit organizations to ensure those who are eligible for the Earned Income Tax Credit-EITC and Child Tax Credit-CTC claim their full, earned share; have access to the financial education necessary to make wise, informed decisions; and gain access to mainstream financial services. In addition to improving individual quality of life, the Prosperity Campaign of Hillsborough & Pinellas Counties improves the economy by bringing in and circulating more money into the local community.

Each year, millions of dollars of Earned Income Tax Credit-EITC and Child Tax Credit-CTC go unclaimed by low- and moderate-income working families in Hillsborough and Pinellas counties. In 2004, people earning less than \$34,458 (or less than \$35,458 if married filing jointly) might have been eligible for federal tax credits of up to \$4,300. In addition, eligible tax payers who had not claimed the EITC or CTC could file for three previous years with a potential of \$12,000 in additional income. Enacted by Congress in 1975, the Earned Income Tax Credit-EITC lifts more American children out of poverty each year than any other government program. It is one of the most effective anti-poverty programs in the nation.

COMMUNITY & FINANCIAL IMPACT

From January 25 through April 15, 2005, an estimated 400 volunteers and staff in 74 free income tax preparation sites throughout Pinellas and Hillsborough counties prepared 15,043 tax returns, with refunds totaling \$10.8 million dollars*

74 free tax preparation sites:

- 56 AARP Foundation TaxAide sites
- 7 TaxAide sites**
- 6 Volunteer Income Tax Assistance-VITA sites**
- 5 The Benefit Bank® sites**

15,043 free tax returns prepared, including 10,900 e-file returns:

- \$2,256,450 estimated savings to tax payers (15,043 returns prepared x \$150 average cost to tax payer = \$2,256,450)
- 2,357 claiming Earned Income Tax Credit-EITC
- 1,310 claiming Child Tax Credit-CTC

\$10,798,531 claimed dollars in Hillsborough and Pinellas counties, including:

- \$2,916,086 Earned Income Tax Credit-EITC
- \$1,558,736 Child Tax Credit-CTC

* as of 4/30/05

** Prosperity Campaign volunteer recruitment, site coordination, and oversight

VOLUNTEERS & STAFF

400 volunteers and staff served TaxAide, VITA and The Benefit Bank® free tax preparation sites

80,000 hours of volunteer and staff time served the Prosperity Campaign

4,800 hours of training for volunteers to become IRS certified tax preparers, site coordinators and greeters/ screeners, and counselors for The Benefit Bank®

Volunteer & Staff figures are estimated as of 4/18/05

The Prosperity Campaign of Hillsborough & Pinellas Counties is an initiative led by the United Way of Tampa Bay in cooperation with the AARP Foundation Tax-Aide and in partnership with EITC outreach through the Internal Revenue Service Volunteer Return Preparation Program.



More than 675,000 consumer flyers and payroll stuffers distributed:

- Hillsborough County government employees
- Pinellas County government employees
- Hillsborough County Department of Health & Social Services
- Pinellas County Department of Human Services
- Children’s Board of Hillsborough County
- Juvenile Welfare Board of Pinellas County
- City employees in Tampa, Clearwater, and St. Petersburg
- School District of Hillsborough County
- School District of Pinellas County
- More than 100 businesses and organizations

1,100 United Way of Tampa Bay stakeholders (business partners, board members, and agencies) received personalized correspondence and program literature

15,000 businesses contacted through partnerships with the Greater Tampa, St. Petersburg, and Clearwater Regional chambers of commerce

20 on-site presentations to area businesses and organizations

Generated program publicity in local media valued at more than \$102,000

- 201 inches of print publicity
- 514 broadcast minutes (television and radio)
- Plus, articles in business and organization newsletters (i.e. *Greater Tampa Chamber of Commerce, Westshore Alliance, Crisis Center of Tampa Bay’s Life Lines, St. Petersburg Chamber of Commerce, The Pinellas Pen*)

3,500 calls relating to the Prosperity Campaign logged by 2-1-1 centers

- 2,000 related calls to Crisis Center of Tampa Bay, Inc.
- 1,500 related calls to 2-1-1 Tampa Bay Cares, Inc.

United Way of Tampa Bay web site hits up 30 percent for first quarter

(www.uwtb.org is the directed point-of-information for Prosperity Campaign marketing, media, and outreach efforts.)

Year-round coordination of core partners, programs, and initiatives for financial education training; “Get Checking” deposit account program; FDIC Money Smart Train-the-Trainer; Credit & Budget Counseling; financial education provider directory; consumer education on the risks and costs of commercial tax preparers and Refund Anticipation Loans (RALs).

PROGRAM PARTNERS

Government and social service organizations:

Internal Revenue Service (IRS); Hillsborough and Pinellas County governments; cities of Tampa, Clearwater, and St. Petersburg; Federal Reserve Bank of Atlanta; Federal Deposit Insurance Corporation; Hillsborough and Pinellas County Extension Services; Hillsborough County Department of Health and Social Services; Pinellas County Human Services; Juvenile Welfare Board of Pinellas County; Children’s Board of Hillsborough County; Pinellas County Health Department; Healthy Start Coalition; Bright Beginnings; Clearwater Gas System; Tampa Housing Authority, Neighborhood Family Centers Coalition

Business:

Leadership Florida; Greater Tampa Chamber of Commerce; Clearwater Regional Chamber of Commerce; St. Petersburg Chamber of Commerce; Regions Bank

Foundations:

Allegany Franciscan Ministries, Inc.; AARP Foundation

Nonprofit organizations

2-1-1 Tampa Bay Cares, Inc.; Crisis Center of Tampa Bay, Inc.; Local Initiatives Support Corporation-LISC; James B. Sanderlin Neighborhood Family Center; St. Petersburg Neighborhood Housing Services, Inc.; CDC of Tampa

Funders:

- United Way of Tampa Bay
- Allegany Franciscan Ministries, Inc.
- Juvenile Welfare Board of Pinellas County
- Children’s Board of Hillsborough County
- Hillsborough County Department of Health & Social Services



For more information:
 (813) 274-0900 (Hillsborough)
 (727) 535-3545 (Pinellas)
www.uwtb.org



Allegany Franciscan Ministries, Inc.

