

## **Cal State LA Volunteer Income Tax Assistance (VITA) Program**

For the 41<sup>st</sup> consecutive year, the Cal State LA VITA Program provides tax preparation services for Los Angeles area residents including electronic filing services, at no cost to taxpayers. In 2023-2024, the VITA program recruited 81 student volunteers. We have eight managers and eight supervisors to manage the six sites:

1. Cal State LA Campus
2. Lincoln Heights Branch Library
3. Young & Healthy (nonprofit)
4. Cypress Park Library (new in 2023-24)
5. El Sereno Branch Library
6. Sunland-Tujunga Branch Library (new in 2023-24)

We provide four online training sessions to students before the tax season begins to help students understand basic tax knowledge, go over sample tax returns, get familiar with the tax preparation software, and understand how to best work with clients. After the training, students, supervisors, and managers are all certified at the Advanced Level and can prepare the more complicated tax returns. Some volunteers and managers also get certified to prepare tax returns for foreign students and scholars.

We provide free tax services to residents and Cal State LA students every Saturday from 9 AM to 1:30 PM from January 28 through April 13. Federal and California tax returns are prepared, quality reviewed, and electronically filed in Cal State LA's computer labs. The VITA program aims to provide tax advocacy, prepare tax returns, and disseminate information to low-to-middle-income, elderly, disabled, and limited English-speaking taxpayers. In 2023-2024, the VITA program prepared about 2,300 tax returns and generated over \$3 million in tax refunds for taxpayers. This means over 2,000 families in the community were served this year. After April 13, we will provide "year-round" VITA service by appointment only.

The VITA program not only provides outstanding free tax preparation service to low-income taxpayers in our community but also provides our students with a quality experiential learning experience in the field of taxation. Student volunteers will be at the staff level in their first year and can be promoted to supervisor and manager in their second and third years. Through the VITA program, student volunteers have a huge positive impact on the lives of many of our region's hardworking families, gain valuable "real world" experience, and enhance their professional employment opportunities. Besides, they have the option to enroll in the VITA course to obtain 3 units of Cal State LA course credit (grad or undergrad).

The Cal State LA VITA Program is part of the CSU+5 group and is co-sponsored by the Internal Revenue Service (IRS) and the California Franchise Tax Board (FTB). We get generous grants from the following sponsors this year:

- IRS \$ 24,000
- FTB \$ 64,000
- IRA \$16,000

Cal State LA faculty involvement:

- John Cooper
- Chenyong Liu
- Xiangge (Angela) Wang
- Patrick Borja
- Lanyi (Summer) Peng