

Volunteer tax program led by UGA professors offers filing help to those who need it

By Johnathan McGinty

As millions of Americans get ready to prepare their income taxes for the annual April 15 filing deadline, Tony Mallon, a clinical associate professor at the University of Georgia's School of Social Work and the Director of the Institute for Nonprofit Organizations (INPO), is doing his part to ensure that everyone, regardless of income level, can get the help they need.

Working in collaboration with Lance Palmer, a professor at the College of Family and Consumer Sciences, Mallon has been partnering for the past two years with the East Athens Development Corporation (EADC) to set up a site focused on offering Volunteer Income Tax Assistance (VITA) services.

VITA is an initiative from the Internal Revenue Service supporting free tax preparation services for underserved partner organizations in communities across the U.S. It helps low-to moderate-income individuals file their taxes by awarding matching funds to support organizations that offer free tax preparation services.

The EADC site, which opened in 2020, is one of three in the Athens area, including locations at Georgia United Credit Union and the Hancock Corridor Development Corporation. One of its main tasks is to ensure its customers are aware of the various tax credits and other financial aid offerings they're eligible for, such as the Earned Income Tax Credit (EITC).

With Palmer serving as the Primary Investigator, the team was awarded a three-year grant totaling \$1.3 million to assist with education, outreach and support efforts related to the EITC, which supplies \$60 billion to low-income working individuals.

"We're proud to help provide this valuable resource to the Athens community and are glad we can help expand offerings through work with other colleges and community partners," said Palmer. "We've seen firsthand the impact this program can have on individuals and families, and it also provides students valuable experiential learning opportunities."

In Athens-Clarke County, an estimated \$5 million to \$15 million of eligible EITC money goes unclaimed, largely because many individuals don't realize such funds are available to them. Considering that more than 30 percent of children in the community are living in poverty, this money can provide an essential infusion of cash for families in need.

The efforts at the EADC VITA site aim to make that happen.

"These tax credits not being utilized is a negative thing for not only the individual who is filing the tax return, but also the local community as a whole," Mallon said. "Low-income families are more likely to spend their money, which stimulates the local economy."

Knowing that Palmer already was running a site with the Georgia United Credit Union, Mallon, who had worked with a VITA site in Virginia prior to joining the faculty at UGA, reached out to Fred Smith, the executive director of EADC, as well as the chair of its board of directors, Dianne Dunston, to set up a second location.

It's another in a long line of initiatives that Mallon, through his work with INPO and the School of Social Work, has pursued with EADC in recent years. Last summer, the organizations collaborated to launch Bridging The Gap, a workshop series focused on equipping unemployed adults with skills needed to be successful when seeking a job. Additionally, working with a local Girl Scout troop and the Clarke-Oconee Tennis Association, they helped start the East Athens Youth Tennis Academy to introduce the sport to children in the community.

The EITC grant provides the resources necessary to raise awareness of the tax credit, and it's a truly integrated effort, pulling from across the University.

Volunteers and staff collaborate with community organizations and local media outlets to maximize educational outreach. The program also undergoes constant evaluation, which inserts a research component into it, while students from across the University participate in a design sprint to develop creative ways to engage the local community.

Even though the grant supporting the EITC outreach still has more than a year of funding left, Mallon already is looking ahead at new ways to expand how the EADC VITA site can help local taxpayers. For instance, he noted many individuals come in initially focused on their tax returns, but then offer up additional questions and challenges that need to be addressed.

"Often when someone comes in to get their taxes done, other issues come up in conversations," said Mallon. "People may have lost a job three months ago and need help getting referred to help finding work or their child is about to graduate high school and apply for college, but they may need support in filling out the various financial aid forms."

At this time, the EADC VITA site isn't prepared to handle those requests, but does have a robust network of agencies that can assist with those needs. Mallon envisions eventually being able to offer a wide range of support services to assist those who need them.