

# CSU5 PLUS VITA

## Collaboration Report

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**CSUDH**



# PRESIDENT'S LETTER



President William A. Covino, Cal State LA

Dear Friends of the CSU5,

The Volunteer Income Tax Assistance (VITA) Program is one of the CSU5's most distinguished and long-standing community service programs. Since the early 1970s, our campuses have partnered with the Internal Revenue Service each year to provide free tax services to hundreds of individuals and families living in Los Angeles County with low-to-moderate incomes, including the elderly, those with disabilities and/or those who lack English language proficiency. These important tax services are provided by our outstanding faculty, staff and trained student volunteers from our respective accounting departments. During the last four years, nearly 3,000 volunteers completed over 41,000 tax returns. This past tax season alone has generated \$13.5 million in federal refunds for individuals and/or their families. Our VITA programs are so successful that they serve as best practice models for many other VITA programs across the United States.

This past year, the CSU5 was awarded the California Earned Income Tax Credit (Cal EITC) Free Tax Preparation Assistance Grant offered by the California Department of Community Services and Development. The grant furnished important new funding to increase awareness about VITA,

reach more eligible communities, and extend deeper into currently-engaged communities. The grant also fostered greater collaboration with VITA programs at our local community colleges, thereby increasing access for low-income individuals and families in Los Angeles County to file their tax returns and receive the California Earned Income Tax Credit. Expanding access was especially important this year with the implementation of the new 2018 "Tax Cuts and Jobs Act" – the first major overhaul of the federal tax code in 30 years.

The impact of the grant and other key outcomes from this past year are included in this annual report. The report also demonstrates the critical importance and social value of CSU campuses in local communities and throughout the regional economy. We remain dedicated to providing invaluable community programs, like VITA, that improve and enrich the lives of individuals and families in our communities.

*William A. Covino*

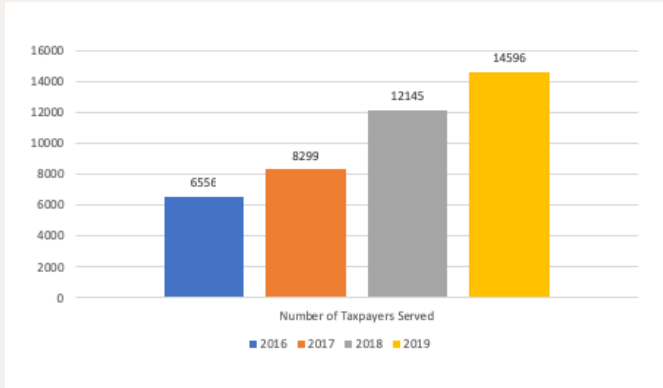
William A. Covino  
President, California State University, Los Angeles (Cal State LA)

On behalf of the CSU5 Presidents:  
Thomas A. Parham - President, California State University, Dominguez Hills  
Soraya M. Coley - President, California State Polytechnic University, Pomona  
Jane C. Conoley- President, California State University, Long Beach  
Dianne F. Harrison - President, California State University, Northridge

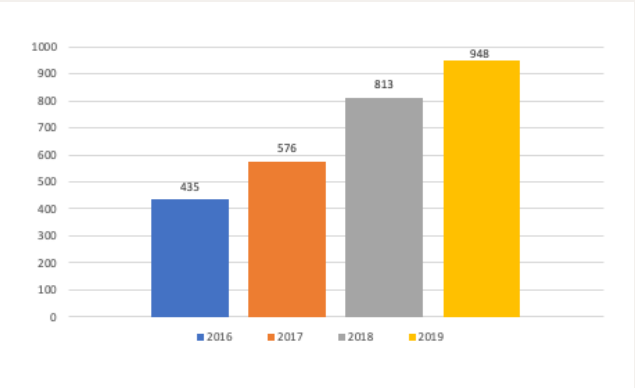
# CSU5 PLUS VITA CLINICS

Thanks to the CSU5 Plus VITA Collaboration, in 2019 nearly 950 student volunteers served more than 14,000 low-income taxpayers in Los Angeles County and generated over \$14.3 million in federal refunds, as well as 4.3 million in federal Earned Income Tax Credits.

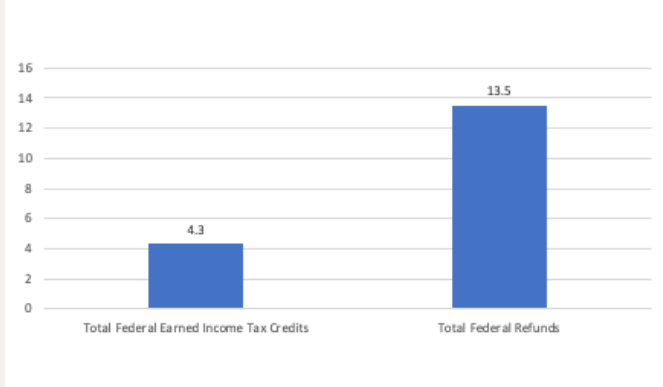
CSU5 PLUS TOTAL NUMBER OF TAXPAYERS SERVED



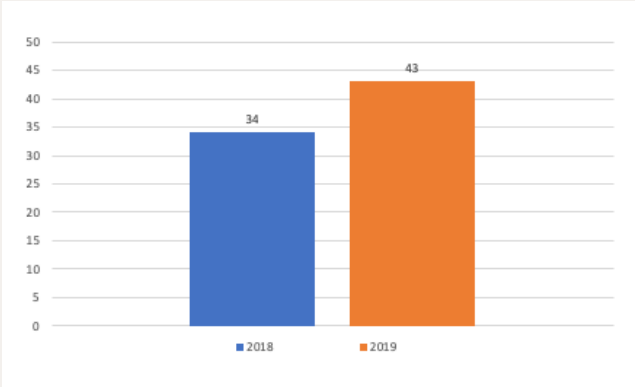
CSU5 PLUS TOTAL NUMBER OF VOLUNTEERS



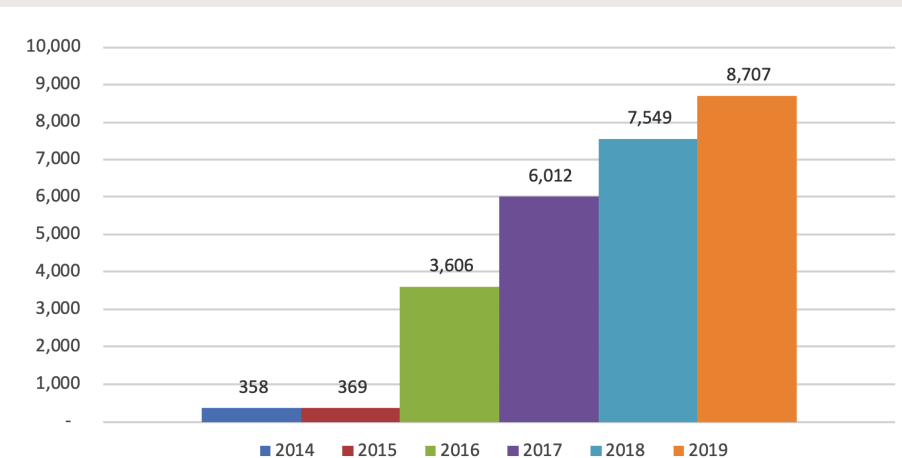
CSU5 PLUS FEDERAL EARNED INCOME TAX CREDITS AND FEDERAL TAX REFUNDS (IN MILLIONS)



CSU5 PLUS TOTAL NUMBER OF VITA SITES



### OVER 8,700 LOW-INCOME TAXPAYERS SERVED



Celebrating its 49th year, the CSUN VITA Clinic once again broke records. Powered by a record 514 volunteers, the CSUN VITA Clinic provided free tax preparation to over 8,700 low-income taxpayers in Los Angeles County.

In all, the CSUN VITA Clinic helped taxpayers claim more than \$10 million in tax refunds and \$4.8 million in tax credits, and saved them over \$1.8 million in tax preparation fees. In 2019, the CSUN VITA Clinic site was ranked as the No. 1 VITA site in Southern California (among 398 sites) and No. 2 in California among over 900 sites. Among academic institutions, CSUN VITA Clinic ranked once again as the largest in California (among 109 sites).

This year the CSUN VITA Clinic expanded its reach beyond the San Fernando Valley to 22 sites. From Jan. 28 through April 15, dedicated volunteers were available six days per week and up to 12 hours per day. Jointly, our volunteers invested more than 24,000 hours of service during this tax season, up more than 3,700 hours over last year.

In collaboration with the Los Angeles Veterans Administration and with vital support from Citi Community Development, the CSUN VITA Clinic built on the peer-to-peer free tax preparation

services to veterans in Los Angeles County with nine veteran-dedicated sites.

A generous contribution from Wells Fargo Bank enabled CSUN VITA Clinic to integrate financial coaching, empowering low-income taxpayers by setting aside a portion of their tax refunds to save for long-term financial goals.

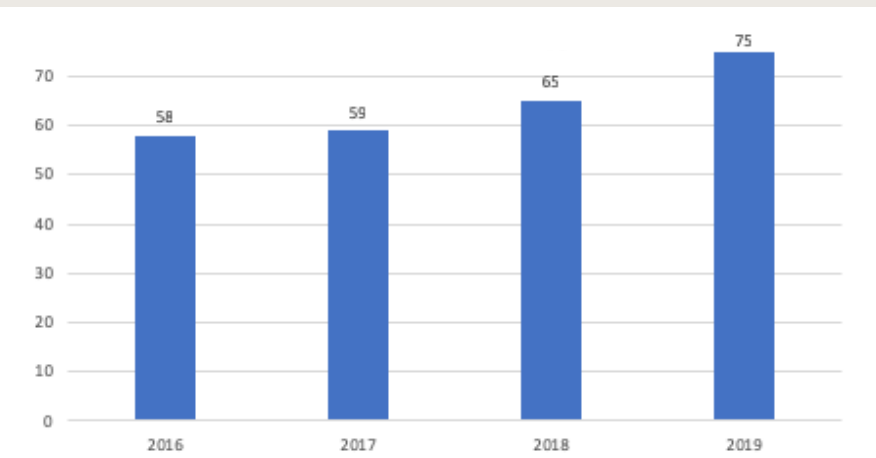
Financial help from City National Bank enabled integration of additional support services, including Spanish interpretation.

CSUN VITA Clinic's success was made possible by the dedication, commitment and hard work of our student volunteers, said Dr. Rafi Efrat, director of the CSUN VITA Clinic.

"Thanks to the endowment created by Harriet and Harvey Bookstein two years ago, we recognized the exceptional work of 12 volunteers with \$1,000 scholarships each," he said.

During an awards banquet on April 25, 2019, Efrat acknowledged the exceptional service provided by CSUN clinic faculty: professor Lucy Nalbandian; Sherry Manavi, Bookstein Institute Coordinator; Rodrigo de Moraes, VITA Clinic Coordinator; and the rest of the leadership team, including Anna Hakopian, Francisco Peralta, Huy Nguyen, Ohannes Ordoghlian, Areli Araujo, Cynthia Montes, Eduardo Torres, Krystsina Taratutka, Danielle Uy, Robert Clark, Jesus Suarez and Manuel Martinez.

### NUMBER OF VOLUNTEERS



California State University, Long Beach is one of 23 California State University campuses in the state and one of five serving Greater Los Angeles. It is also an important and well-respected educational and community institution in the Pacific-coast city.

Located in the second-largest city in the Los Angeles metropolitan area, CSULB is in a unique position to provide a wide array of services to its diverse community. With a population numbering about 470,000, a number that includes significant Latino and Asian populations, the city faces unique contemporary challenges.

As part of a wide, service-driven effort, CSULB has been an earnest partner of the CSU5 Plus VITA Collaboration.

"One of the biggest challenges at our site is our low number of repeat volunteers," noted "Every year we have a new batch of volunteers that need to be trained and introduced to the process," said Vincent Nguyen, CSULB site coordinator. "To resolve the issue, we make sure our volunteers know where to research for specific tax issues. We keep multiple reference documents on site."

During the 2019 tax season, the CSULB VITA Clinic's 75 volunteer tax preparers helped 1,307 community members file their annual tax returns. In so doing, they have generated \$1,087,807 in federal tax refunds and \$294,908 in federal Earned Income Tax Credits.

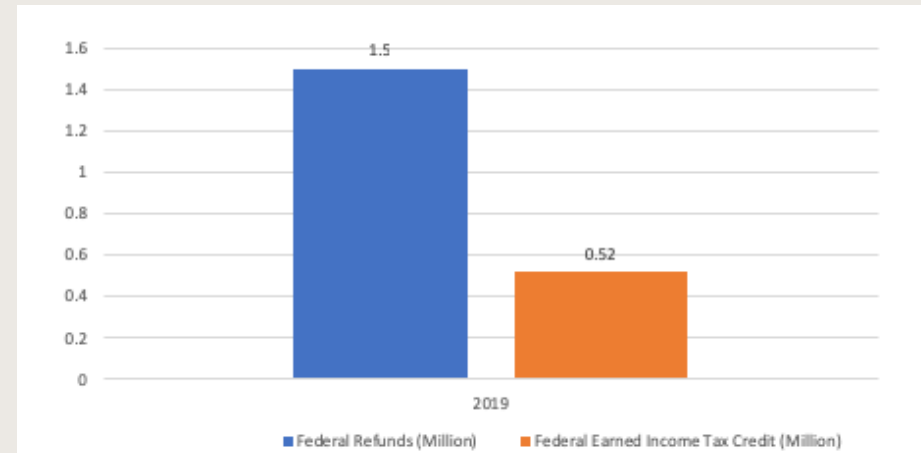
"Our volunteers are given an opportunity to make an impact on their community," Nguyen said. "They can accrue basic tax experience, practice their soft skills and network with their fellow accounting students."

"Leonard Sanchez and Pau Khai, both of our accounting students, finished the season with 26 and 25 accepted returns, respectively. This is great for their resumes and recruiting."





## BENEFIT TO TAXPAYERS



California State University, Los Angeles is one of 23 California State University Campuses, and one of five serving Greater Los Angeles. It is an important and well-respected educational and community institution in Northeast Los Angeles.

As part of the CSU5 Plus VITA Collaboration effort, Cal State LA has been an enthusiastic partner.

During the 2019 tax season, the Cal State LA VITA Clinic's 85 volunteer tax preparers helped 1,463 low income taxpayers in the community file their annual tax returns. These efforts generated \$1.5 million in federal tax refunds and over half a million dollars in federal Earned Income Tax Credits.

The VITA Clinic's success at Cal State LA has been the result of a joint effort to serve the community.

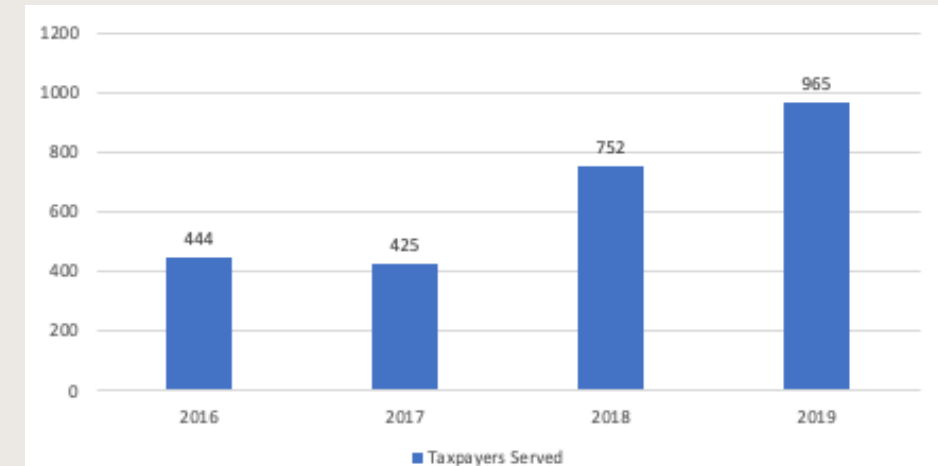
"Cal State LA alumni and current students helped get our operation running," said Suren Sahakyan, a CPA, program director, and accounting professor at Cal State LA. "It's rewarding. Community involvement is important and the students have the opportunity to learn practical skills."

Individual efforts also stood out.

"Ajith Sudevan graduated from Cal State LA in 2013, but has continued to contribute to our VITA Clinic every tax season since his graduation," Sahakyan said. "It's remarkable."



## TAXPAYERS SERVED



California State Polytechnic University, Pomona is one of 23 California State University campuses and one of five serving greater Los Angeles. It is an important educational and community institution in eastern Los Angeles County.

CPP joined the CSU5 Plus VITA Collaboration initiative, which harnessed the power of strategic, long-term inter-community alliances and resources.

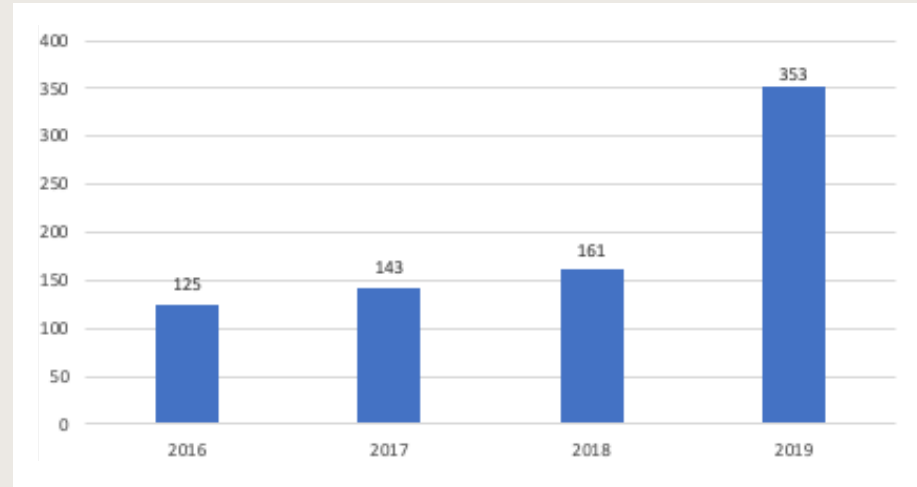
As part of this wide, service-driven effort, CPP has been a resolute partner. Though their commitment to community service is strong, there have been some challenges in carrying out such an endeavor. Yan-Shu Zhao, accounting professor and CPP site coordinator, noted that scheduling has been difficult as the university recently changed from a quarter-based system to a semester-based system, which limited the time available for VITA trainings. Nevertheless, they met the challenge head-on. There have also been rewards for both students and the community.

"Our students understand how to apply tax laws by preparing real returns," Zhao said. "They improve their communication skills by working with taxpayers and working with other students. And they also help out the community."

During the 2019 tax season, the CPP VITA Clinic's 75 volunteer tax preparers helped 965 low income taxpayers file their annual tax return. In so doing, they have generated \$1,078,601 in federal tax refunds and \$355,157 in Federal Earned Income Tax Credits.



## TAXPAYERS SERVED



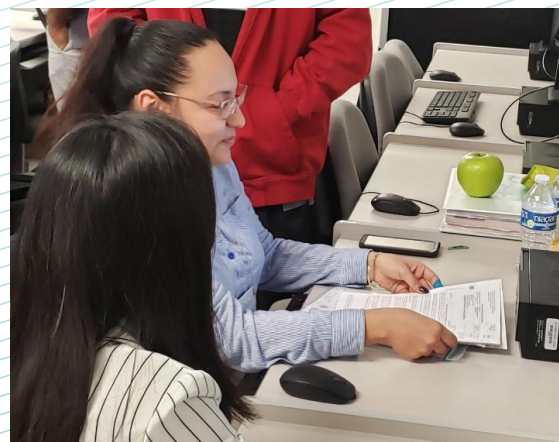
California State University, Dominguez Hills is one of 23 California State University campuses and one of five serving Greater Los Angeles. It is an important and well-respected educational and community institution in the South Bay city of Carson.

California State University, Dominguez Hills has been an enthusiastic partner of the CSU5 Plus VITA Collaboration. However, the university's efforts have not been without challenges. Arek Arakelian, a CPA, accounting professor, and site coordinator at CSUDH said that, "the main problem is the lack of experienced volunteers. Most of our volunteers are students who are in their last semester of college," he said. "So they will not be able to come back next year to share the experience they earned this year."

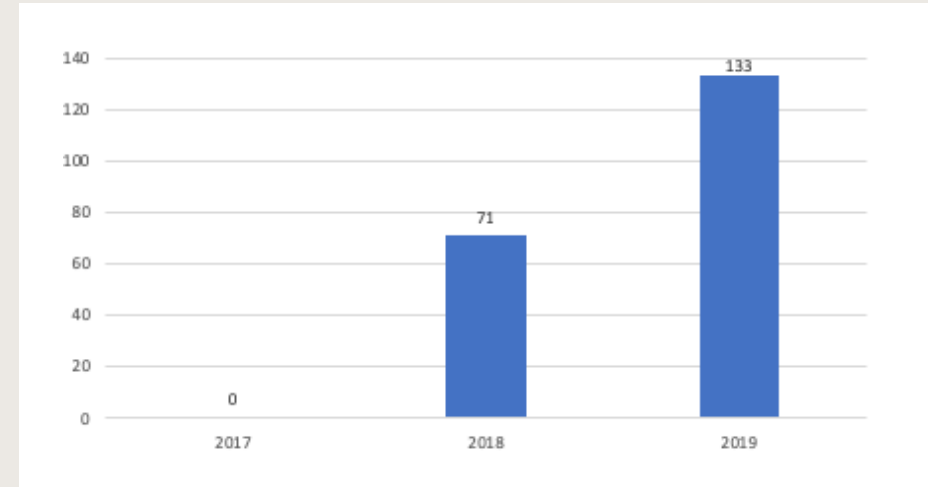
However, staff and volunteers at the CSUDH VITA Clinic were prepared to address this issue. "The same situation applied to last year's volunteers," Arakelian said. "We solved this problem by bringing experienced volunteers from other colleges."

During the 2019 tax season, the CSUDH VITA Clinic's 36 volunteer tax preparers have helped 353 community members file their annual tax returns. In so doing, they have generated \$465,051 in federal tax refunds and \$131,985 in Federal Earned Income Tax Credits.

The VITA Clinic's success at CSUDH has been the result of a joint effort to reach a common goal, which reaped many rewards. "Helping needy communities has been very rewarding and the students have gained valuable experience doing so," Arakelian said. "Most of our volunteers did a great job as a team. The 2019 VITA success is the result of a great team effort."



## TAXPAYERS SERVED



Based in Sylmar, Los Angeles Mission College is an important and respected institution in the Northeast San Fernando Valley.

LAMC has been an enthusiastic partner of the CSU5 Plus VITA Collaboration. Their work, however, has not been without challenges.

"Our biggest challenge has been getting people to come in and use our free tax filing service," said Anna Barsegyan, an attorney and LAMC site coordinator. "Though we have increased our marketing efforts from the previous year, it has been a considerable challenge. Thankfully, our Business and Law Department chair, Vilma Bernal, and accounting professor Steven Nerud, have been very helpful in making sure our operation here runs smoothly."

During the 2019 tax season, the LAMC VITA Clinic's 16 volunteer tax preparers helped 133 low income taxpayers file their annual tax returns. These efforts generated \$113,169 in federal tax refunds and \$64,158 in federal Earned Income Tax Credits. "The most rewarding part has been seeing our students take the reins and get practical experience," Barsegyan said. "In the beginning they're understandably nervous. However, we've

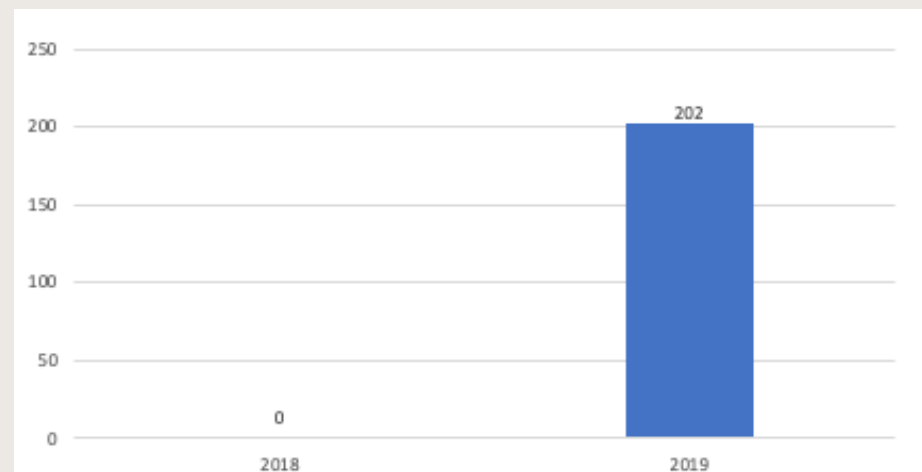


noticed that by the third return, they are comfortable and familiar with the process." Returning student volunteers have also played a big part in helping the LAMC VITA Clinic.

"Both of my student assistants, Ines Sandoval and Lourdes Lara, are returnings volunteers and have been a great help to me and to the program," Barsegyan said. "Their great service, willingness to help and enthusiasm have been a joy to watch."



### TAXPAYERS SERVED



College of the Canyons is an integral and well-respected educational and community institution in the northern Los Angeles County city of Santa Clarita.

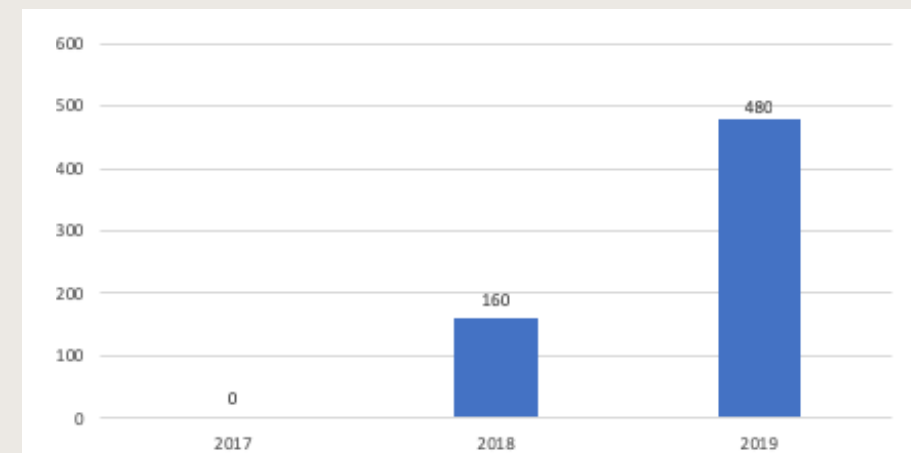
During the 2019 tax season, Canyons joined the CSU5 Plus VITA Collaboration. Harnessing the power of strategic, long-term inter-community alliances and resources, the CSU5 Plus VITA

Collaboration aims to connect education to professional practice and community life and link research to economic and community development to help solve contemporary challenges.

In 2019, Canyons VITA Clinic's 31 volunteer tax preparers helped more than 200 taxpayers with low incomes file their annual tax returns.



### TAXPAYERS SERVED



Santa Monica College is an important and integral part of its local community. Located in the city of Santa Monica, the college is the only one under the governance of the Santa Monica Community College District and has worked to meet the needs of its constituency.

SMC has been an enthusiastic partner in the CSU5 Plus VITA Collaboration.

"Firstly, I get a chance to continue mentoring my tax students in applying the tax law and watch them grow as tax professionals," said Cesar Rubio, an accounting professor at SMC and the institution's site coordinator. Secondly, I get a chance to serve low-income SMC students and community members, including individuals with disabilities, senior citizens and veterans. It has been an honor to serve them and to offer our tax preparation expertise to those who need it."

During the 2019 tax season, the SMC VITA Clinic's 23 volunteer tax preparers helped 480 community members file their annual tax returns. These efforts generated \$305,083 in federal tax refunds and \$87,114 in Federal Earned Income Tax Credits.

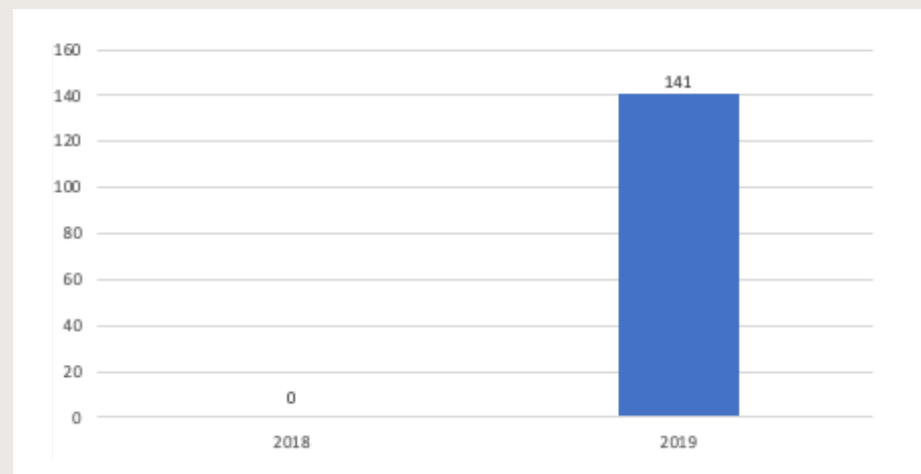
Yin-Chi Kuo, an accounting major and volunteer at SMC, noted that each day he volunteered, he steadily gained more confidence and improved his communication skills. "It made me feel needed by others in the community," he said. "I enjoy it when they say 'thank you' and shake my hand."

The volunteers at SMC noted that it is the service to the community that is both the most important and fulfilling. "As tax preparers, we have a tremendous responsibility to the public," said Sarah Fitzpatrick, a volunteer enrolled in the Small Business Tax Practice certificate program. "Participating in VITA provides an opportunity to demonstrate that we have the integrity and ability to do the job."

The commitment to serve the community also means serving during difficult times.

"Each client is different. A few have come in to file final returns for their deceased loved one," Fitzpatrick said. "I have a great deal of compassion for their circumstances, because I know how it feels to lose someone. Hopefully, we can make the filing process a little less stressful for them."

### TAXPAYERS SERVED



Long Beach City College is an important and well-respected educational institution in its community.

LBCC has been an enthusiastic partner of the CSU5 Plus VITA Collaboration.

"This program really fills a need for those who cannot afford representation," said Tanya Weinheimer, a CPA and LBCC site coordinator. Their work, however, has not been without challenges, which they have addressed confidently. "We had a core crew of four-five individuals that were constantly committed to serving; however, class load and work schedules often conflicted," Weinheimer said. "We were able to utilize some of the students from CSULB to cover on two occasions when we were short staffed."

During the 2019 tax season, the LBCC VITA Clinic's 17 volunteer tax preparers helped 141 community members file their annual tax returns. These efforts generated \$134,690 in federal tax refunds and \$55,819 in federal Earned Income Tax Credits.

There is always a silver lining as the rewards far outweighed the challenges. Weinheimer said

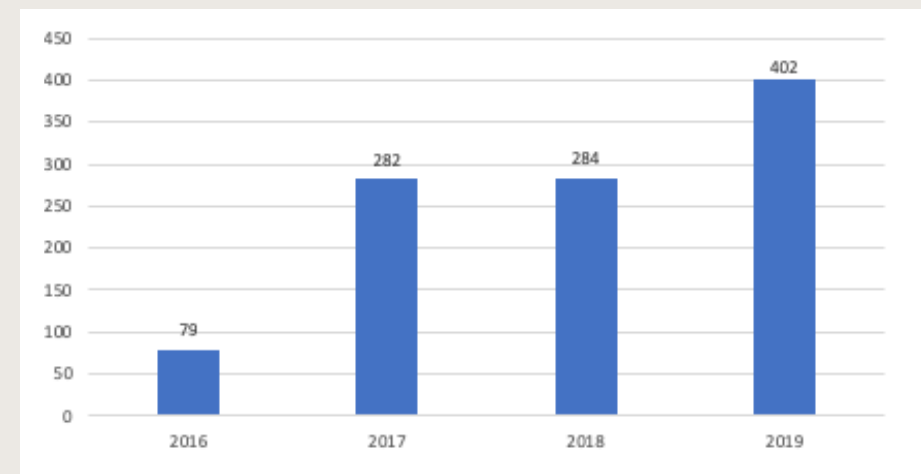
that it was also the service they provided to the community that left a lasting impression. "All of the clients were so appreciative and patient. We had one family with two young children come into the clinic for help. Their tax position was not simple and serving them took many hours," Weinheimer noted. "The children were so good and both of the parents were so patient and appreciative of our help. They thanked us and hugged all of us."

This grand effort could not have been produced without the collective effort of staff, volunteers and faculty.

"Watching students grow and learn to become future accounting professionals has also been rewarding," Weinheimer said. "I was amazed at how professional, caring and conscientious they were."

"Laura Kusaba, an accounting student, was an outstanding volunteer. She was my co-coordinator and displayed an amazing ability to serve the community with compassion," Weinheimer continued. "Her attention to detail was amazing and the clients responded extremely well to her. She stepped up to the task always with a smile on her face."

### TAXPAYERS SERVED



Mt. San Antonio College is an important and well-respected institution in the eastern Los Angeles County city of Walnut. Over the course of its long history, it has helped educate the community around it.

Mt. SAC is one of the largest community colleges in the country, serving numerous communities in east Los Angeles County including Baldwin Park, Covina, Diamond Bar, La Puente, Irwindale, Pomona and West Covina, among others.

Mt. SAC has been an enthusiastic partner in the CSU5 Plus VITA Collaboration. However, this effort has not been without its challenges.

"Keeping everyone motivated, focused and ready to work in an ever-changing business and tax landscape has been challenging," said Steven Valdes, a CPA, accounting professor and Mt. SAC site coordinator.

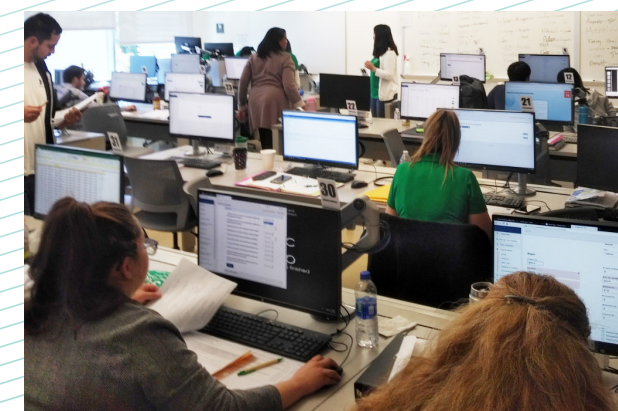
During the 2019 tax season, Mt. SAC VITA Clinic's 57 certified volunteer tax preparers helped 402 community members file their annual tax returns. These efforts have generated \$319,532 in federal tax refunds and \$105,410 in federal Earned Income Tax Credits.

The help and support provided to the VITA Clinic at Mt. SAC has proven to be important.

"The terrific support of our Business deans Jennifer Galbraith and Fawaz Al-Malood and our IT staff has also played a critical role in making sure things run smoothly," Valdes said. Funding provided by the college was also critical.

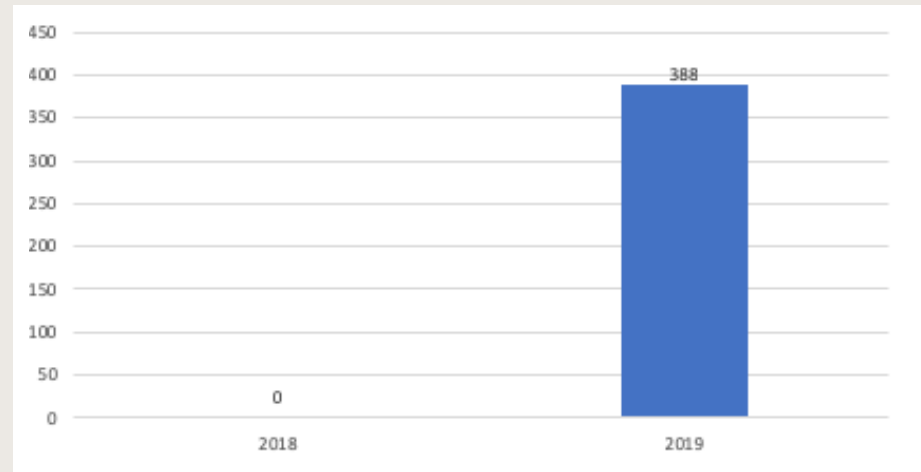
Valdes also noted that the rewards of such an important endeavor have been numerous, highlighting that student volunteer tax preparers are undergoing incredible professional development.

"Watching students pass the certification exams, as well as work through actual client meetings and returns, and applying the tax codes has been rewarding," Valdes said. "Watching students improve and develop professionally has also been rewarding."





## TAXPAYERS SERVED



East Los Angeles College is one of nine community colleges that form the Los Angeles Community College District. It is an important institution in the San Gabriel Valley city of Monterey Park.

ELAC has been an enthusiastic partner in the CSU5 Plus VITA Collaboration.

"We serve a diverse multi-ethnic and multilingual community with a wide variety of needs," said Satoshi Kojima, an accounting professor and ELAC site coordinator. "Thankfully, our volunteer tax preparers are all well-trained, highly competent and happy to help. Many of them are bilingual or multilingual and speak languages such as Spanish, Vietnamese, Chinese, Russian and many others, which has proven helpful in helping the community with tax preparation."

During the 2019 tax season, the ELAC VITA Clinic's 25 volunteer tax preparers helped 388 community members file their annual tax returns. In so doing, they generated \$320,972 in federal tax refunds and \$128,073 in federal Earned Income Tax Credits, which Kojima notes will be extremely helpful for the community.

"Our primary service area is very big and has a lot of needs. Our volunteers have been great and love to help," Kojima said.

Humility and desire to help the community remain a happy constant.

"Our volunteers are great," Kojima said. "In fact, one of our best volunteers is a nursing student. She came in and wanted to volunteer to help. She completed her training and did very well. In fact, once she got started, she needed very little direction. She completed tax returns quickly and professionally, and connected well with community members."

Help from the collective resources of the CSU5 Plus VITA Collaboration has also proven to be a boon to ELAC and the surrounding communities.

"Honestly, the help has been tremendous. CSUN has helped tremendously as we worked to get our operation going here at ELAC," Kojima said. "Dr. Rafi Efrat's help has proven invaluable and he is always happy to help. Everything he has helped us with, from support, to funding, to supplies, has been incredible, and that alone has helped us immensely. It all has gone a long way to ensure that we serve the community."

# CSU5



**CSUDH**



**LOS ANGELES  
MISSION COLLEGE**

**SANTA  
MONICA  
COLLEGE**



**LONG BEACH  
CITY COLLEGE**



**CALIFORNIA STATE UNIVERSITY  
LONG BEACH**  
College of Business

**CSUN** | **NAZARIAN  
COLLEGE**

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