

2026 - 10 YEAR VITA REPORT

10-year Return on Investment (ROI) - \$2,491,657

2026 Return on Investment (ROI) - \$613,021.

Who we served

- In 2026, the average household income is \$20,316 on 2025 returns. To put this into perspective, our [Jennings County ALICE Report](#) “survival budget” is \$27,036 for a single person and \$73,008 for a family of four.
- 59% of our clients receive social security and 76% have a primary or secondary taxpayer over 60.

Program Growth

- In 2025, we partnered to bring Jefferson County into our program.
- 2026 we were awarded our first IRS VITA Grant. This is a 3-year award.
- Starting in 2026, we will be open in North Vernon on a limited basis year-round by appointment.

Summary Report

VITA program year	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
<i>Report date</i>	4/24/2017	4/20/2018	4/23/2019	8/27/2020	5/27/2021	5/19/2022	4/25/2023	4/18/2024	5/22/2025	5/20/2026
Volunteers										
Estimated volunteer hours	300+	370+	570+	300+	200+	200+	300+	735	910	1607
Total Certified Volunteers	7	6	7	4	3	3	5	8	19	23
People Served										
People (# of exemptions)	143**	199**	220+**	151	128	111	162	185	422	483
Average AGI (Adjusted Gross Income)	\$17,000	\$15,364	\$20,338	\$20,753	\$19,974	\$21,913	\$18,260	\$17,403	\$20,213	\$20,738
Total Returns Prepared	119	166	200+	120	88	82	122	148	351	390
Return on Investment										
Total Estimated ROI	\$173,207	\$238,528	\$223,964	\$154,722	\$139,990	\$111,860	\$145,005	\$215,018	\$476,432	\$613,021

ALICE – Asset Limited Income Constrained Employed. Learn more! jcunitedway.org/assets/ALICE2025-JenningsIN.pdf

Detail Report

VITA program year	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
<i>Report date</i>	4/24/2017	4/20/2018	4/23/2019	8/27/2020	5/27/2021	5/19/2022	4/25/2023	4/18/2024	5/28/2025	5/20/2026
VITA site open/close dates	1/23/2017- 4/18/2017	1/23/2018- 4/18/2018	1/28/2019- 4/12/2019	1/27/20- 7/2/2020 (July)	2/3/2021 - 4/28/2021	1/19/2022- 4/11/2022	1/24/2023- 4/12/2023	1/23/2024- 4/10/2024	1/20/2025-4/15/2025	1/13/26-4/14/2026
Volunteers										
Estimated volunteer hours	300+	370+	570+	300+	200+	200+	300+	735	910	1607
Total Certified Volunteers	7	6	7	4	3	3	5	8	19	23
Certified Advanced Level	6	5	6	4	3	3	4	7	10	14
Certified Basic Level									9	10
Certified Greeter	1	1	1				1	1		1
People Served										
People (# of exemptions)	143**	199**	220+**	151	128	111	162	185	422	483
Average AGI (Adjusted Gross Income)	\$17,000	\$15,364	\$20,338	\$20,753	\$19,974	\$21,913	\$18,260	\$17,403	\$20,213	\$20,738
Returns with Taxpayers 60+	50	70	98	62	63	55		109		296
Total Returns	119	166	200+	120	88	82	122	148	351	390
Percent of Returns e-filed	98%	98%	99%	100%	100%	100%	97%	95%	96%	97%
Married		35%	26%	23%	27%	24%	22%	21%	21%	21%
Appointments in NV building									450+	530
Additional Assistance							30	52	100	150

Available report fields change from year to year so some of the data items tracked change from year to year.

Return on Investment

ROI	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Total refund amount claimed	\$142,000	\$195,919					\$101,915	\$147,245	\$340,562	\$440,113
Federal Refunds		\$172,399	\$168,460	\$122,160	\$114,000	\$85,000	\$81,630	\$123,711	\$293,264	\$377,408
State Refunds		\$23,520					\$16,877*	\$22,082*	\$47,298	\$62,705
Average refund amount	\$1,434	\$965	\$974	\$1,018	\$1,334	\$1,126	\$835	\$985	\$1,078	\$1,702
EITC Claimed (Earned Income Tax Credit)	43 totaling \$56,483	43 totaling \$50,472	46 totaling \$39,356	31 totaling \$18,970	18 totaling \$17,782	25 totaling \$24,255	26 totaling \$20,570	33 totaling \$40,364	65 totaling \$103,951	69 totaling \$111,646
Value of Return Preparation	\$23,800	\$33,200	\$40,000	\$24,000	\$22,000	\$20,500	\$33,550	\$44,400	\$105,300	\$117,000
Value of Volunteer Time	\$7,407	\$9,409	\$15,504	\$8,562	\$3,990	\$6,360	\$9,540	\$23,373	\$30,480	\$55,908
Total Estimated ROI	\$173,207	\$238,528	\$223,964	\$154,722	\$139,990	\$111,860	\$145,005	\$215,018	\$476,432	\$613,021

Available report fields change from year to year so some of the data items tracked change from year to year.

*As of 2023 (Tax year 2022) we began adding \$1 of other income to force e-file for all returns with zero AGI to help prevent identity theft.

**estimated based on # of returns and average

In 2025, we took on Jefferson County under our VITA program.

In 2026 we will be open on a limited basis, by appointment at year. We will close the site April 15, and reopen mid-May and will not offer appointments in July or in December until the site opens mid-January.

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