



approach to change financial habits to facilitate financial security and self sufficiency. If we can make a difference in this approach; clients can make life altering changes to lead to a better quality of life for our County. We also had an aggressive marketing campaign to reach clients who came into our agency for assistance. We worked with work first Clients, foster parents, elderly adults, single parents, non-custodial parents that owed child support,

disabled adults, and students. By targeting our DSS population; we saved our agency time & money by improving the quality of services we offer and providing alternatives to financial assistance.

**4. Please describe why this project was initiated or what problem it addressed:**

This program offered a whole new approach to engage clients and gain trust to initiate positive change regarding asset accumulation and financial literacy. This program offers a proactive long term approach to address the limited financial literacy of many low to moderate income families; as well as offering community resources to assist with needs. When clients were screened in to get taxes done at our Career Plus VITA site they were given the opportunity to sign up for our Money Smart Class that is promoted and endorsed by the FDIC as well as given a Benefits for Working Families Brochure that explains many resources in our community for families.

**5. Please quantify the improvement's results in terms of cost savings, cost avoidance and/or a higher level of services provided. (Please indicate what resources were used to achieve your results and what was done with the time savings, if any accrued).**

2004 VITA Results...

? 51 Volunteers to do free Tax Preparation

? Hours of Operation: February 10 through April 13; Tuesdays & Thursdays 6pm – 8pm; Saturdays from 9am – 1pm

? 380 total hours volunteered

? 110 Total Clients Served

? 84,706.00 Combined Federal/State Refunds

? 11,000.00 Additional Savings for Clients in Tax Return Prep. Fees Saved

? 95,706.00 Total in Pocket Money Generated For Wilson County Residents

? Partners: Employment Security Commission, Wilson Tech, DSS Board of Directors, IRS, FDIC, County Commissioners, City Council, Faith Community, Wilson Daily Times, Sertoma Club, Barton College, Senior Center, Chamber of Commerce, local temporary agencies

IRS report will be generated later in the year to determine what percentage of Earned Income Tax Credit was claimed in Wilson County.

**6. Please provide any other descriptive information you would like to be considered by the review committee.**

This has been a very successful first year project. We plan to more than double our outreach next year. This is a wonderful opportunity for any community. Wilson County participated on a panel at the National Association of Counties in Washington, DC on March 1<sup>st</sup> 2004. The Wilson County Campaign was presented to counties across the country as a model. Wilson County was on the panel with a representative from the Brookings Institution and a representative from the Center on Budget and Policy Priorities both in Washington, DC. It was an honor and privilege to share this wonderful outreach with other counties across the country.

**County  
Manager:**

**Ellis Williford**

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**Supervisor's  
Name:**

**Susan Parker**

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Return by JUNE 1, 2004 via email Rebecca.Troutman@ncacc.org