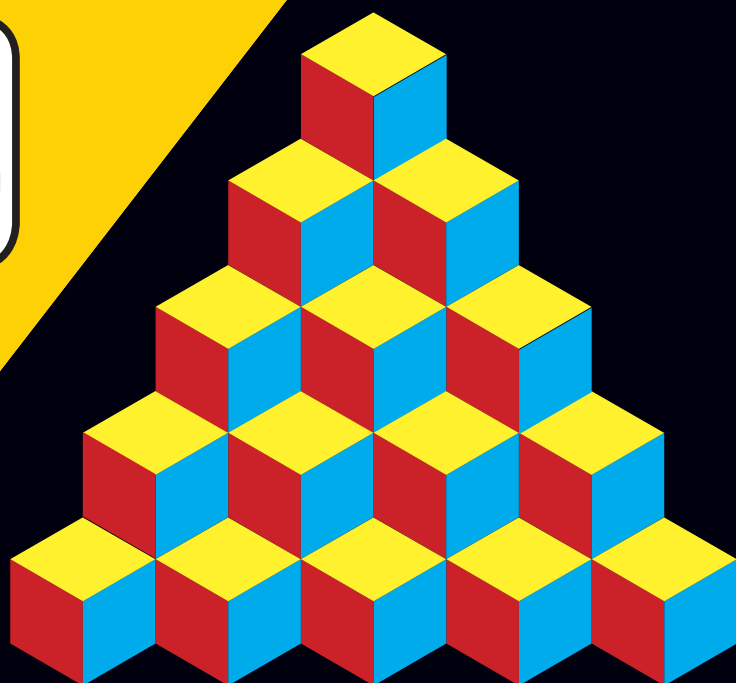
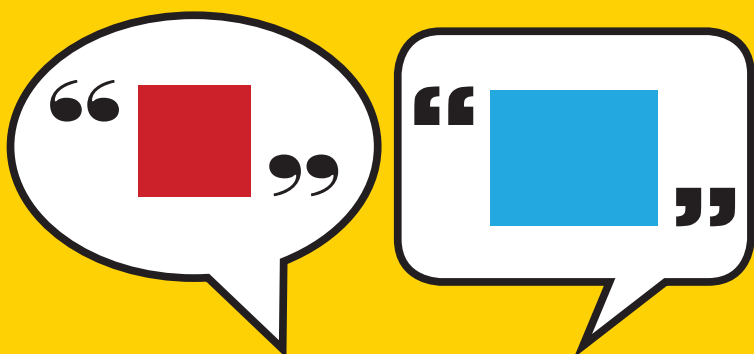


**REAL
ECONOMIC
IMPACT
TOUR**

2010-2011
Annual
Progress
Report

From Conversation...



to Inclusion


All change starts with a conversation.

With one voice sharing a new idea and asking others
“Are you with me?”

As the idea catches on, thousands of light bulb moments
illuminate a new path of possibility.

Those possibilities evolve into opportunities,
opportunities into action,
action into a movement.

Before long, a new reality emerges; a new way of doing
things that the world was ready for but didn't know was
possible until that moment.



**And it all started
with one conversation,
one idea,
one vision
for lasting change.**



Conversation.
Education.
Collaboration.
Implementation.
Inclusion.

That’s our recipe for change at National Disability Institute. We believe lasting change starts from a single conversation, from sharing and implementing a big idea with the power to transform lives and the world as we know it.

The economic empowerment of individuals with disabilities is that idea for us—an idea that is both timely and long overdue.

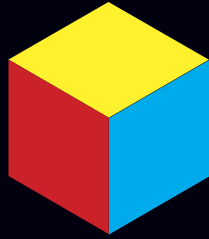
Building a better economic future for Americans with disabilities is a conversation National Disability Institute helped start nearly a decade ago—in the basement of a Washington, D.C. bank—when we realized that even with all the access and change in our world, **1 in 3 Americans with disabilities still lives in poverty**. Over brown bag lunches, we brought together disability organizations, research institutions, federal agencies and community asset building groups to answer one question: **why are so many Americans with disabilities living in poverty and how can we change it?**

The ideas generated from these sessions helped sow the seeds that grew into **National Disability Institute’s Real Economic Impact (REI) Tour**—a movement of more than **800 organizations in 100 cities across America** that has helped more than **1 million individuals with disabilities** take steps out of poverty by providing access to financial education and asset building programs as well as free volunteer income tax assistance generating more than **\$1 billion in tax refunds**.

From a single question came a movement that has touched millions and integrated disability thinking and awareness into hundreds of community organizations, government agencies and businesses across America. Together, National Disability Institute and its valued partners have helped realize change by

*being part of the conversation,
being part of the solution,
being part of one of the most important social issues of our time—*

the economic empowerment of persons with disabilities.



NATIONAL DISABILITY INSTITUTE

- A national non-profit organization dedicated to building a better economic future for all persons with disabilities.
- The first national organization committed exclusively to championing economic empowerment, asset development and financial stability for Americans with disabilities.
- Launches innovative initiatives to help the 1 in 3 Americans with disabilities living in poverty to move toward financial independence and economic self-sufficiency.
- Initiatives include the Real Economic Impact (REI) Tour as well as more than a dozen forward-thinking, collaborative employment, educational, research and training programs.
- Effects change through public education, policy development, demonstration programs, research, training and technical assistance.
- Builds partnerships with national and community organizations, government agencies, financial institutions, universities and research institutions and businesses.
- Fosters cultures of change by helping partners to embed disability inclusive practices throughout their organizations.

Changing the Economic Future For Americans with Disabilities

National Disability Institute’s Real Economic Impact (REI) Tour is pioneering a roadmap out of poverty for millions of working Americans with disabilities the old fashion way—one conversation, one partnership, one meeting and one city at a time.

Since 2005, the REI Tour contributed to improving the economic lives of more than 1 million taxpayers with disabilities representing \$1 billion in tax refunds. The Tour is built on effective collaborations with more than 800 community-based organizations across 100 cities and with dozens of public/private national partners—all with the singular goal of building a better economic future for taxpayers with disabilities.

The REI Tour’s main national partner, the Internal Revenue Service (IRS), advanced the evolution of this movement by introducing National Disability Institute and the REI Tour to its 40-year-old trusted network of free volunteer income tax assistance coalitions across the country. This “introduction” sparked hundreds of conversations and marshaled a new level of community collaboration, providing a forum for disability and non-disability organizations to begin working together to address accessible tax preparation, financial education

and asset development programs for persons with disabilities. As one mid-west city coalition leader said after attending her first meeting ever at the local Independent Living Center, “Meeting the CEO and realizing the scope of their network—35,000 citizens—was worth it alone! To think we are neighbors and we had never connected before.”

Our goal is to collaborate with community groups, public entities and businesses to make disability thinking, awareness and inclusion a natural part of the financial independence conversation.

Equal parts program and service access, disability awareness, technical assistance, outreach and community organization. That’s the REI Tour in a nutshell. Our goal is to collaborate with national and community groups, public entities and businesses to make disability thinking, awareness and inclusion a natural part of the financial independence conversation; introducing stakeholders to one another to lead the charge for change for more solid financial futures for persons with disabilities in their communities.

REAL ECONOMIC IMPACT TOUR	
MISSION AND OBJECTIVES	OUTCOMES
<ul style="list-style-type: none"> ■ Improve the economic lives of people with disabilities and their families. ■ Build disability inclusive communities of practice. ■ Promote economic justice. 	<ul style="list-style-type: none"> ■ Increase access for taxpayers with disabilities. ■ Create new models for integrated service delivery. ■ Test innovative technology and social media solutions.



CITY OF THE YEAR
FREEHOLD, NJ

**From Tax Assistance
 To Tax Assistant**

Local New Jersey woman benefits from VITA tax services, volunteers to help others

FOR NERISSA JONES, the biggest reward of being a volunteer income tax assistance (VITA) site preparer is the smiles.

“Helping people that have had experiences where they didn’t get anything back or dealt with a predatory tax prep company, helping them get the most out of their tax return is very rewarding” said Nerissa. “You should see their faces when they see they’re getting money back. It’s a thrill for me.”

After first experiencing VITA services as a client, Nerissa, 53, went through the training and certification to become a volunteer income tax preparer with her local VITA site through Community Enterprises Corporation, an affiliate of Collaborative Support Programs of New Jersey (CSPNJ), one of National Disability Institute’s REI Tour partners.



Nerissa, an individual with recovery, mental health and wellness goals who is both a program participant and a manager of one of CSPNJ’s statewide self-help centers in Carney’s Point, used to spend a substantial portion of her limited income and SSDI benefits to pay a preparer to do her taxes. “I got charged \$200 to do the taxes and then I owed \$400,” she said. But when she learned she qualified for free VITA services, things changed. “I got more than I thought. This year I got close to \$300 back. I tucked it away for a rainy day to build my emergency savings.”

And that emergency fund may come in handy. Thanks to the financial and social programs offered by CSPNJ, Nerissa has been able to get a job and move from being homeless to being a homeowner. As an agency, CSPNJ is run by individuals with recovery, mental health and wellness goals with programs encouraging peer-to-peer support and empowerment for persons with mental health and rehabilitation challenges, a program that Nerissa credits for helping her get where she is today.

“Every little success and big success has built up my desire to stay well and made me value my desire to stay well,” said Nerissa. “To be able to inspire people and believe in people and to help to urge people on to greatness, that’s really important to me.”

Sustainable Change Through Action, Access and Understanding

Building bridges between community groups, creating action plans and dispelling myths and misunderstandings through financial education and disability inclusive thinking are some of the many ways National Disability Institute's Real Economic Impact Tour fosters sustainable change.

The REI Tour team works with partners, sponsors and government liaisons in 100 cities (up from 11 cities in 2005) to build local coalitions, infrastructures and events. The Tour provides technical assistance, materials and education and funds organizational mini-grants to assure inclusion and access of the disability community to free volunteer income tax preparation (VITA), financial education and asset building programs.

Greater access for persons with disabilities to financial programs changes lives. Many persons with disabilities receiving public health and social services benefits fear that any amount of income or savings—even a tax return to which they may be entitled—might cause them to lose their benefits. The REI Tour helps dispel those common myths by providing financial and benefits education to help persons with disabilities realize there are options and programs available, such as the Earned Income Tax Credit (EITC) or an Individual Development Account (IDA), to help them move toward economic self-sufficiency and pursue their dreams.

By working to embed a disability inclusive mindset with stakeholders from large, non-disability organizations and international businesses to local groups, National Disability Institute's REI Tour

advances economic development for persons with disabilities at a national, state and local level. When local coalitions start to take off on their own, when more persons with disabilities have access to free tax preparation and financial education services, and when disability thinking becomes a natural part of the community asset building conversation—that's when sustainable systems change begins to take hold.

The REI Tour team also helps local groups break down barriers and understand “community” programs not inclusive of or accessible to persons with disabilities leaves out a huge portion of

every community—namely 54 million persons with disabilities, 1 out of every 5 Americans.

Due to the number of our military veterans returning home with a disability after serving our country in Iraq and Afghanistan,¹ and the large percentage of the more than 78 million baby boomers entering their 60s with more age-related disabilities than the previous generation,² the number of Americans with disabilities is expected to grow in the coming years. Disability knows no bounds—cutting across age, gender, ethnicity, income, region and virtually every demographic category. Organizations and businesses need to expand inclusion and access for persons with disabilities beyond regulatory norms or get left behind.

“Community” programs not inclusive of or accessible to persons with disabilities leave out a huge portion of every community—namely 54 million persons with disabilities, 1 out of every 5 Americans.

1 Federal Reserve Bank of Boston (2010). Opportunities for Community Development Finance in the Disability Market

2 American Journal of Public Health (Jan. 2010). UCLA Division of Geriatrics, David Geffen School of Medicine at UCLA study.



7-YEAR REI TOUR SUMMARY — OUTCOMES AND COMMUNITY IMPACT								
Year	Cities	Local Partners	Returns Prepared	% Increase	EITC Claims	EITC Amounts	Refunds Received	Tax Prep \$ Saved
2005	11	—	7,600	—	1,710	\$0.7 m	\$ 6.8 m	\$1.5 m
2006	33	200	17,223	127%	3,875	\$1.6 m	\$15.3 m	\$3.4 m
2007	54	355	36,275	111%	8,162	\$3.7 m	\$32.6 m	\$7.2 m
2008	62	555	90,653	150%	20,397	\$9.7 m	\$81.5 m	\$18.1 m
2009	84	634	181,152	100%	40,759	\$19.4 m	\$176.6 m	\$36.2 m
2010	100	710	360,499	99%	81,112	\$38.5 m	\$351.5 m	\$72.0 m
2011	100	>800	397,090	10%	119,127	\$43.7 m	\$387.1 m	\$87.4 m
	TOTAL		1,090,492		275,142	\$117.3 m	\$1.05 b	\$225.8 m

CITY OF THE YEAR
EL PASO, TX

Fostering Community Change In El Paso

El Paso Affordable Housing partners with local independent living center to build financial independence for citizens with disabilities

AS LOCAL EL PASO, Texas, residents and long-time community advocates, Larry Garcia of El Paso Affordable Housing (EPAH) and Maria Perez, LMSW, of Volar Center for Independent Living (CIL) knew each other and of each other’s work, but had never considered working together beyond referrals. But when National Disability Institute’s REI Tour connected the two groups, they realized their work was not independent, but interdependent.

With 1 in 3 Americans with disabilities living in poverty, the asset development and disability conversation are one in the same. “Part of our mission is to provide financial education to the population that is unbanked or under banked in El Paso... and many folks have disabilities,” said Larry, president of EPAH.

EPAH and Volar CIL created change for the local

disability community. EPAH made sure all of their volunteer income tax assistance (VITA) sites were accessible and established a VITA site at Volar’s offices, placing one of its AmeriCorps volunteers, Lily Castro, onsite to oversee VITA and to create and teach a 10-module financial education

program for persons with disabilities. Volar CIL teamed with a local school district to offer the financial education program to students with disabilities preparing to graduate, earning Volar recognition as an agency of the year.

The partnership and its programs changed many lives. One woman with a disability returned to

college after realizing during financial education classes that her social security disability benefits wouldn’t be jeopardized if she applied for financial aid. Even Castro, EPAH’s AmeriCorps volunteer, has decided to pursue a career working with persons with disabilities.

“More people with disabilities are using their money wisely, being more responsible, more educated and more self-sufficient,” said Maria. “Most people with disabilities really do want that. Most people would rather have a hand up than a hand out.”



(L-R) Lily Castro, Maria Perez and Larry Garcia

Dedicated Partners Build A Life-Changing Movement

Every grassroots movement is only as effective as the passion and commitment of the people involved. National Disability Institute's Real Economic Impact (REI) Tour is no exception.

The dedication of our national sponsors and community partners help drive systems change and build brighter economic futures for Americans with disabilities. Our partners not only promote disability-inclusive thinking in their tax, financial education and asset development initiatives, but also embrace a disability outlook within their organizations.

And while our partners have joined with National Disability Institute to grow a nationwide movement, the REI Tour and the movement itself have helped them grow as well.

Non-profits in the free tax and asset building business participating in the REI Tour have expanded the reach of programs and services, increased metrics, found new local partners, leveraged new resources at the local, state and federal level, encouraged boards and volunteers to be more disability inclusive, all while increasing the economic self-sufficiency of taxpayers with disabilities.

Our partners not only promote disability-inclusive thinking in their initiatives, but also embrace a disability outlook within their organizations.

The REI Tour's private sector participants have built a better economic future for persons with disabilities in more than 100 cities nationwide, changed existing myths about working with and employing persons with disabilities, empowered their employee resource groups with a new volunteer focus, received national recognition for work in disability, expanded corporate public policy awareness of disability issues relevant to strategic corporate markets, received timely and effective information about disability from national experts, met new partners at the local, state and national level, and expanded diversity platforms to be fully inclusive.

Together, National Disability Institute along with our partners and sponsors has built a national movement that is modernizing 21st century disability programs and policy with the singular goal of creating a better economic future for Americans with disabilities.

NATIONAL DISABILITY INSTITUTE • REAL ECONOMIC IMPACT TOUR SPONSORS 2010-2011



Bank of America



ACORDA[®]
THERAPEUTICS

Sealund

Alaris
Financial Literacy

REI TOUR 2010-2011 ACCOMPLISHMENTS

1. REI Tour Partners assisted 397,090 persons with disabilities in completing free tax returns.
2. Increased refunds to taxpayers with disabilities from \$351.5 million in 2010 to \$387.1 million in 2011, representing \$43.7 million in Earned Income Tax Credit.
3. Saved taxpayers with disabilities \$87.4 million in tax preparer fees.
4. Increased the number of local partners from 713 in 2010 to more than 800 in 2011.
5. Presented Asset Development Summits in 10 cities and benefits trainings in 13 cities.
6. Convened workgroup meetings in 17 cities to help the city coalitions kick off their disability initiatives.
7. Presented a series of webinars that reached more than 400 individuals.
8. Traveled more than 111,000 miles educating more than 2,300 individuals.
9. REI Tour Team presented at more than 25 national, regional and state conferences and national webinars in 2011.
10. Innovative social media strategies expanded program's reach to thousands of persons with disabilities, more than doubled the number of taxpayers exploring how to file their own taxes and attracted many younger taxpayers for the first time.

CITY OF THE YEAR ANCHORAGE, AK

Advancing Independence In Anchorage

Alaskan woman feels empowered filing her own taxes

ANNA ATTLA HAS ADVOCATED for independence for herself and for other persons with disabilities for more than 25 years.

A native Alaskan of Athabascan Indian descent, Anna grew up in the small village of Galena, a small "bush" community of 650 people accessible only by air, boat or all-terrain vehicles and best known as a biennial checkpoint for the famous Iditarod Sled Dog race. Anna, a person with a developmental disability, moved to Anchorage in the mid-1980s on her own to advance her independence through greater access to employment, independent living opportunities and public transportation.

Anna's life blossomed after her move. She works part-time as a program aide for the University of Alaska's Center for Human Development, owns her

own home, and serves on the Governor's Council on Disabilities and Special Education as a self advocate, a position she's held since 2002.

Anna, 51, also works with a Social Security "payee" to help her manage her finances. For years, Anna used a paid tax preparer, but when her "payee" saw a flyer this year advertising NDI's REI Tour partner Anchorage Financial Partnership Network's free volunteer income tax assistance (VITA) site, Anna decided to give it a try.

As a result, Anna saved \$50 on tax preparer fees and qualified for a \$300 return from the Earned Income Tax Credit (EITC), a significant sum for Anna who's budget allows for only \$10 per month in discretionary spending. "I paid up my light

and gas bills ahead of time, put some money in my checking account and saved the rest," said Anna of how she used her tax return.

But just as important as the tax refund, was the sense of empowerment Anna experienced filing her own taxes. "It was good I did it on my own," Anna said. "I was happy that I could do it on my own even if I did need help with the questions."



DeafTax VITA Pilot: Building Equal Access for Deaf Taxpayers

Expressing yourself in your native language is the most effective way to communicate for most people. The same goes for persons who are deaf. Most persons who are deaf consider American Sign Language (ASL) to be their native language. Since ASL is not the same as spoken English, there is better understanding when deaf people use ASL to communicate.

In 2008, National Disability Institute through the Real Economic Impact (REI) Tour in partnership with the Internal Revenue Service's (IRS) Stakeholder Partnerships, Education and Communication (SPEC), DeafTax.com and Schwarz Financial Services designed and implemented a DeafTax Volunteer Income Tax Assistance (VITA) pilot to increase equal access to free tax assistance for deaf taxpayers in five REI Tour cities.

The pilot connected deaf taxpayers and deaf tax preparers through state-of-the-art videophones, allowing for deaf-to-deaf tax preparation using ASL to communicate. Deaf tax filers made appointments at their local participating host organizations and connected via secure videophone, scanner and computer to a tax preparer in a remote location.

Expressing yourself in your native language is the most effective way to communicate for most people. The same goes for persons who are deaf.

The 2011 tax season marked the third year deaf taxpayers could use this pilot program to file, yielding a 22 percent increase in the number of returns prepared. Eleven REI Tour cities participated including Honolulu and New York City. Approximately 271 deaf taxpayers with an adjusted gross income of \$19,506 used the service, resulting in \$416,039 in tax refunds, with \$139,804 in earned income tax credit (EITC).

The DeafTax pilot also generated a major systems outcome in 2011. IRS and the National Treasury Employee Union (NTEU) together authorized the service-wide use of the Video Relay Service (VRS). IRS is the first federal agency to provide a fully encrypted version of this service as an additional communication tool for deaf and hard of hearing (DHOH) employees to do their jobs.

SOCIAL MEDIA: USING NEW TOOLS TO ENGAGE TODAY'S TAXPAYERS WITH DISABILITIES

In 2011, National Disability Institute and the REI Tour continued its leadership role in the non-profit sector on the use of social media and marketing techniques to increase VITA traffic and reach diverse populations (deaf, blind, etc.) by introduction of innovative strategies.

With funding from Walmart, National Disability Institute's REI Tour along with partners United Way Worldwide and OneEconomy rolled out innovative social media strategies around the MyFreeTaxes.com initiative that not only expanded the programs reach to thousands of persons with disabilities, but also more than doubled the number of taxpayers exploring how to file their own taxes and attracted many younger taxpayers for the first time. This collaboration introduced innovative ways to "tweet" approved messages to ensure that many more taxpayers hear, read or see trusted information. Radio Reading service ads for the blind were broadcast in several states. These 60-second ads were then repurposed with captions and pictures and posted on YouTube for wider distribution and effectiveness.

CITY OF THE YEAR
WASHINGTON, DC

A Sign of Things to Come

Capital Area Asset Builders joins forces with the university for the deaf to expand deaf taxpayer services

Emilia Chukwuma knows how busy tax season can get.

Since 2005, Emilia, the chair of the business department and a professor at Gallaudet University, the world's leading undergraduate liberal arts university for the deaf and hard of hearing based in Washington, D.C., has overseen Gallaudet's volunteer income tax assistance (VITA) program. Each year, Emilia and her team of IRS-certified business student volunteers offer free tax preparation services at Gallaudet to deaf and hard of hearing as well as hearing taxpayers. Emilia and her team are flooded all year with requests from deaf taxpayers in the local community and around the country, eager to talk through their taxes using their native language, American Sign Language (ASL).

"Many deaf people we meet have never had this kind of help before and have struggled using a hearing tax preparer," Emilia said. "With tax preparation there are communication issues in general... If we are able to sign that makes more sense than reading something on a piece of paper."



(L-R) Emilia Chukwuma and Maurita Coley

After an introduction from National Disability Institute's REI Tour team, Emilia and her team were happy to join forces with REI Tour partner Capital Area Asset Builders (CAAB), Community Tax Aid and the Washington, D.C. Earned Income Tax Credit (EITC) Campaign to expand VITA service availability for deaf taxpayers throughout the D.C.-metro area.

CAAB and Gallaudet volunteers partnered with the Martin Luther King Jr. Memorial Library's Adaptive Services Center to offer a VITA site at the library with a variety of supports for taxpayers with disabilities. Several taxpayers

accessed the site. One taxpayer who was both deaf and blind was able to use

tactile or palm signing, communicating his return information directly into a tax preparer's hand, possible only because the site offered ASL-fluent preparers. Gallaudet student volunteers also served as preparers on the mobile MyFreeTaxes.com VITA van, part of national program from One Economy, United Way Worldwide and National Disability Institute sponsored by Walmart.

"Our partnership with Gallaudet was such a transformative addition to the Campaign," said Maurita Coley, CAAB's executive director. "We look forward to building on and expanding that relationship to better service the community for years to come."

The partnership's marketing efforts garnered a **127 percent increase in total MyFreeTaxes.com site visits**. In addition, **28,863 people visited as a direct result of social media referrals, a 50 percent increase from 2010**. The REI Tour and its MyFreeTaxes.com partners created a successful marketing communication strategy by coordinating prewritten content publicized across multiple platforms. This approach allowed for not only unified messaging, but also a low-effort way for local REI Tour partners to participate in online publicity. **Leveraging the networks of others allowed us to exponentially increase the reach of our message.**

National Disability Institute also offered several on-site trainings and webinars to educate REI Tour partners on social media best practices.

The "old fashion way" of building trusted relationships continues to be enhanced as use of new technologies usher in new ways to communicate critical messages and reach underserved populations.

By the Numbers

OVERALL

- More than 1 million taxpayers with disabilities receiving more than \$1 billion in tax refunds since 2005
- 5,125 percent increase in the number of persons with disabilities filing taxes through REI Tour VITA sites
- 6,143 percent increase in earned income tax credit (EITC) claims filed through REI Tour VITA sites

2010-2011

- 397,090 persons with disabilities assisted in completing free tax returns
- \$387.1 million in refunds, representing \$43.7 million in earned income tax credit (EITC)
- \$87.4 million in saved tax preparer fees
- 111,013 miles traveled
- 2,345 meeting attendees
- 800 local partners
- 100 cities
- 1 mission



Taxpayers with Disabilities By the Numbers

- Median income of taxpayers with disabilities is nearly half that of non-disabled peers: \$16,366 vs. \$32,028.
- Taxpayers with disabilities receive approximately \$800 less on average in EITC than their non-disabled counterparts.
- 46 percent of taxpayers with disabilities reported being unemployed or underemployed and on disability.
- 36 percent of taxpayers with disabilities were aware of volunteer income tax preparation clinics and only 6 percent reported using the services.

Source: *Taxpayers with Disabilities 2010 Report*, IRS SPEC Wage & Investment Research and Analysis, September 2010

Volunteer Prepared Tax Returns For Persons With Disabilities By State 2011 Tax Season

State	Number of Sites	Total Accepted Returns	Estimated Persons with a Disability
Alaska	33	13,151	1,521
Alabama	138	32,101	3,900
Arkansas	81	27,405	4,273
Arizona	192	73,105	8,679
California	1,040	249,776	29,035
Colorado	128	42,205	4,961
Connecticut	199	42,807	4,799
District of Columbia	32	8,543	1,248
Delaware	61	16,192	2,090
Florida	552	200,018	23,626
Georgia	219	62,162	6,738
Hawaii	66	18,498	2,553
Iowa	136	29,351	4,789
Idaho	56	19,087	2,371
Illinois	276	83,881	12,553
Indiana	185	52,641	8,888
Kansas	112	42,830	9,342
Kentucky	183	56,514	6,579
Louisiana	156	36,472	5,350
Massachusetts	187	55,985	7,478
Maryland	209	49,013	5,797
Maine	67	16,403	2,177
Michigan	309	72,221	16,894
Minnesota	252	73,618	17,081
Missouri	246	60,832	10,009
Mississippi	95	26,230	3,826
Montana	60	15,064	1,928
North Carolina	507	133,329	13,985
North Dakota	29	7,652	1,076
Nebraska	77	20,322	2,531
New Hampshire	59	13,529	1,821
New Jersey	246	47,039	5,384
New Mexico	77	41,135	6,747
Nevada	83	23,626	2,703
New York	564	185,360	27,185
Ohio	420	106,785	13,565
Oklahoma	141	60,333	7,729
Oregon	141	54,374	6,619
Pennsylvania	452	120,355	15,872
Rhode Island	61	13,472	2,156
South Carolina	149	37,514	5,117
South Dakota	33	9,457	1,327
Tennessee	187	52,723	6,240
Texas	561	212,510	28,566
Utah	102	22,637	2,447
Virginia	213	78,066	9,435
Vermont	50	7,388	1,369
Washington	217	71,021	7,802
Wisconsin	159	57,956	11,375
West Virginia	127	31,146	4,578
Wyoming	29	5,401	517
Puerto Rico	6	894	37
AE	46	25,915	1,000
AP	22	16,784	918
Sites with No ZIP Code Available	32	3,334	505
TOTAL	10,600	2,936,162	397,090

2010-2011 REI TOUR CITIES

Albany, NY	Detroit, MI	New Orleans, LA	Sioux Falls, SD
Albuquerque, NM	El Paso, TX	New York, NY	Springfield, IL
Anchorage, AK	Fargo, ND	Newark, NJ	Springfield, MA
Appleton, WI	Flint, MI	Norfolk, VA	St. Louis, MO
Atlanta, GA	Fresno, CA	Oakland, CA	St. Petersburg, FL
Austin, TX	Ft. Lauderdale, FL	Oklahoma City, OK	Stockton, CA
Bakersfield, CA	Great Falls, MT	Omaha, NE	Syracuse, NY
Baltimore, MD	Hartford, CT	Orlando, FL	Tallahassee, FL
Baton Rouge, LA	Honolulu, HI	Pensacola, FL	Tampa, FL
Birmingham, AL	Houston, TX	Philadelphia, PA	Topeka, KS
Boise, ID	Indianapolis, IN	Phoenix, AZ	Traverse City, MI
Boston, MA	Jackson, MS	Pittsburgh, PA	Tucson, AZ
Bridgeport, CT	Jacksonville, FL	Portland, ME	Tulsa, OK
Buffalo, NY	Kansas City, KS	Portland, OR	Washington DC
Burlington, VT	Las Vegas, NV	Providence, RI	West Palm, FL
Charleston, SC	Lexington, KY	Raleigh, NC	Wichita, KS
Charleston, WV	Little Rock, AR	Reno, NV	Wilmington, DE
Charlotte, NC	Los Angeles, CA	Richmond, VA	Wilmington, NC
Chattanooga, TN	Louisville, KY	Riverside, CA	Winston-Salem, NC
Cheyenne, WY	Madison, WI	Rochester, NY	
Chicago, IL	Manchester, NH	Sacramento, CA	
Cincinnati, OH	Memphis, TN	Salt Lake City, UT	
Cleveland, OH	Miami, FL	San Antonio, TX	
Columbus, OH	Milwaukee, WI	San Diego, CA	
Dallas, TX	Minn/St. Paul, MN	San Jose, CA	
Denver, CO	Mobile, AL	Santa Anna, CA	
Des Moines, IA	Nashville, TN	Seattle, WA	

2011 REI Tour City of the Year Award Winners

FREEHOLD, NJ

Community Enterprises Corporation,
an affiliate of Collaborative Support Programs of
New Jersey (CSPNJ)

Peter Stahl, Director, Fiscal and Financial Services

Program Highlights:

- Created a free volunteer income tax assistance (VITA) program as well as financial education and asset building programs for individuals with recovery, mental health and wellness goals.
- 98 percent of taxpayers accessing VITA sites received refunds.
- In all three statewide VITA sites, the majority of taxpayers served had disabilities (51 percent).

WASHINGTON, DC

Capital Area Asset Builders (CAAB)

DC EITC Campaigns

Program Highlights:

- Expanded outreach to deaf and hard of hearing taxpayers by conducting VITA services and educational seminars in American Sign Language (ASL) through partnerships with Gallaudet University, the IRS and D.C.'s Martin Luther King Jr. Memorial Library Adaptive Services Center.
- Developed relationships with several Washington, D.C.-area disability organizations.
- Provided onsite and mobile VITA.

REAL ECONOMIC IMPACT TOUR: 2010-2011 PUBLIC-PRIVATE PARTNERSHIPS

LEAD PARTNERS

National Disability Institute
Internal Revenue Service, Stakeholder Partnerships, Education and Communication (IRS SPEC)

SPONSORS

Walmart
Bank of America
AT&T
Acorda Therapeutics
Friess Family Foundation
National Institute on Disability and Rehabilitation Research
Sealund & Associates

PARTNERS

AARP—Tax Aide
American Council of the Blind
American Legion
Association of Programs for Rural Independent Living (APRIL)
Burton Blatt Institute, Syracuse University

Center for Budget and Policy Priorities
DeafTax.com
Department of Veteran Affairs
Easter Seals
Economic Empowerment Institute
Federal Deposit Insurance Corporation
Global Partnerships & Disability Development
Goodwill Industries International
Internal Revenue Service, Small Business and Self-Employed (SB/SE)
National Association of Councils on Developmental Disabilities
National Association of Financial Planners
National Association of the Deaf
National Community Tax Coalition (NCTC)
National Council on Aging

National Council on Independent Living (NCIL)
National Deaf Business Institute
National Disability Rights Network (Protection and Advocacy)
National Federation of Community Development Credit Unions
National Industries for the Blind
NCB Capital Impact
Paralyzed Veterans of America
Schwarz-Financial, LLC
Shared Horizons, Pooled Trust for Persons with Disabilities, Washington, DC
Social Security Administration, Office of Employment Support Programs
Taxpayer Advocate Service, IRS
The Arc of the United States

U.S. Department of Education, Office of Special Education & Rehabilitative Services
U.S. Department of Health and Human Services, Office on Disability
U.S. Department of Labor, Employment and Training Administration (ETA)
U.S. Department of Labor, Office of Disability Employment Policy (ODEP)
U.S. Department of Labor, Veterans Employment and Training Service (VETS)
U.S. Department of the Treasury, Office of Financial Education
U.S. Hispanic Council on Aging
United Spinal Association—Vets First
World Institute on Disability
Wounded Warriors Track Program, Jacksonville, FL

EL PASO, TX

El Paso Affordable Housing

Larry Garcia, President

Program Highlights:

- Partnered with Volar Center for Independent Living (CIL) to offer accessible VITA services, a financial education program for persons with disabilities and disability awareness training.
- Created and distributed a financial education and asset building community resource guide for persons with disabilities.
- Formed a community disability awareness workgroup.

ANCHORAGE, AK

Governor's Council on Disabilities and Special Education

Program Highlights:

- Conducted Super Saturday VITA events to connect taxpayers with disabilities to additional services including social services, vocational rehabilitation, financial education and asset building.
- More than 23 percent of total persons served at VITA sites were taxpayers with disabilities, resulting in \$528,00 in returns.
- Created Anchorage Financial Partnership Network, a coalition of disability, asset building and social service organizations and hosted statewide Asset Summit in July 2011.



2011 REI Tour Grant Awards By Organization and City

CASH Coalition of the Greater Capital Region and Wildwood Programs, Inc., Albany, NY
Financial Partnership Network, Anchorage, AK
Center for Financial Independence Innovation, Atlanta, GA
Atlanta Prosperity Campaign/Atlanta Community Food Bank, Atlanta, GA
Foundation Communities—Community Tax Centers, Austin, TX
Baltimore CASH Campaign, Baltimore, MD
REIT Baltimore/Mayor's Commission on Disabilities, City of Baltimore, Baltimore, MD
United Way Financial Stability Partnership of Alabama, Birmingham, AL
Boston Earned Income Tax Credit Coalition, Boston EITC Coalition Disability Initiative, Boston, MA
Community Link/Family Financial Literacy Coalition, Charlotte, NC
Center for Economic Progress, Chicago, IL
Regional EITC Initiative, Cincinnati, OH
Dallas Lighthouse for the Blind, Dallas, TX
DC Earned Income Tax Credit Campaign, Washington, DC
Accounting Aid Society, Detroit, MI
Wayne County Asset Building Coalition/Wayne Metropolitan Community Action Agency,
Inclusive Access to Tax Prep, Detroit, MI
Coalition for Family Economic Progress, VITA Disability Initiative, El Paso, TX
Florida Prosperity Partnership, Tallahassee, FL
Community Enterprises Corporation VITA, Newark, NJ
Hartford Asset Building Collaborative, Co-opportunity, Inc., Hartford, CT
Goodwill Industries of Hawaii, Inc., Honolulu, HI
Neighborhood Tax Centers/Money Week Houston/Bank on Houston, Houston, TX
Jackson Asset Building Coalition United Way of the Capital Area, Jackson, MS
RealSense Prosperity Campaign, an initiative of United Way of Northeast Florida, Jacksonville, FL
KC CASH Coalition, Inc., KC CASH Disability Initiative, United Way of Greater Kansas City, Kansas City, MO
Louisville Asset Building Coalition, Louisville, KY
Prosperity Campaign of Miami, Catalyst Miami, Miami, Florida
AccountAbility Minnesota, Minneapolis/St. Paul, MN
NYC Tax and Benefits Disability Coalition, New York, NY
Food Bank for New York City, Earned Income Tax Credit Program, New York, NY
Earn It! Keep It! Save It! Bay Area, Earn It! Keep It! Save It! (EKS) Disability Initiative, Oakland, CA
Goodwill Industries of Central Florida, Inc., Central Florida REI Tour Initiative, Orlando, FL



Escambia Financial Stability Coalition, Pensacola, FL
 Campaign for Working Families/Greater Philadelphia Urban Affairs Coalition, Philadelphia, PA
 City of Phoenix Earned Income Tax Credit Campaign, Outreach for People with Disabilities, Phoenix, AZ
 Greater Portland CA\$H Coalition, CA\$H Greater Portland Deaf Tax Day, Portland, ME
 CASH Oregon, Portland, OR
 C.A.S.H, Rochester, NY—Empire Justice Center, Rochester, NY
 Earn it. Keep it. Save it, Earn it. Keep it. Save it. Disability Initiative, Salt Lake City, UT
 Alamo City Coalition for Economic Self Sufficiency, San Antonio REI Tour Workgroup, San Antonio, TX
 San Diego Committee on Employment of People with Disabilities, Tax and Financial Awareness for People with Disabilities/ San Diego Countywide EITC Coalition San Diego, CA
 Seattle-King County Asset Building Coalition and United Way of King County VITA coalition,
 AmeriCorps Financial Support Services at Cares of Washington, Seattle, WA
 Gateway EITC Community Coalition, St. Louis, MO
 Financial Stability Initiative of Tampa Bay, Tampa Bay, FL
 Community Action Project Free Tax Preparation Program, Tulsa, OK
 Delaware Earned Income Tax Program, Wilmington, DE

2010 REI TOUR MAYOR’S LEADERSHIP ACADEMY SPONSORS

Walmart
Kaye Scholer LLP
Amerigroup Foundation
Federation of Community Development Credit Unions
Protected Tomorrows
Center for Economic Progress

2011 REI TOUR PARTNER AWARD WINNERS

<p>RON SMITH AWARD Mimi Turchinetz Campaign Director, Boston EITC Janet Hamer Senior Community Development Manager, Federal Reserve Bank of Atlanta</p>	<p>RICHARD KEELING LEADERSHIP AWARD Bob Williams Associate Commissioner for Social Security, Office of Employment Support Programs</p>	<p>OUTSTANDING LEADERSHIP AWARD Walmart for Improving the Economic Lives of Americans with Disabilities</p>
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Dear Partners,

The National Disability Institute's core truth is that social inclusion goes hand-in-hand in building economic inclusion for people with disabilities. Over the past decade we have tested this truth repeatedly through our national and local initiatives always asking—Are we building a better economic future for people with disabilities? Are people with disabilities better off because of NDI's work?

If you read the report on the preceding pages you know the answer is a resounding yes! NDI's Real Economic Impact Tour partners have built the movement and taken ownership of adopting inclusive practices to serve individuals with disabilities. The work in more than 100 cities is expanding perceptions, attitudes and behaviors about disability. The Tour's first seven years attracted many non-disability community-based organizations who, not surprisingly, hold the same core truth—that people who own assets have better lives and experience more social and economic inclusion. These organizations have become the champions for including people with disabilities into the economic mainstream. They are the real pioneers. They have taught those of us in the disability world a great lesson about inclusion. It is not about people with disabilities talking with other people with disabilities or about disability focused nonprofit groups, but about collaboration across diverse partnerships.

When we started NDI, some of our harshest critics came from our colleagues in the disability community. Some referred to asset development as “heresy”—how could we suggest that people on public benefits could save, work or strive toward economic self-sufficiency? Why should a person receiving monthly income maintenance and working a few hours a week file a tax return? Open a savings account? Wouldn't they lose their health care or public benefits? All good questions. We provided good answers. And yet, many questions remain unanswered because they reflect views and attitudes left over from another century. We know from our work with the Tour since 2005 that for more than 1 million low- to moderate-income taxpayers with disabilities, the rewards of filing a return (beyond the \$1 billion in tax refunds generated) is the realization that a path exists toward economic and social inclusion and personal independence regardless of one's ability.

As the National Disability Institute moves into the next generation of work during these uncertain times, it is clear that modernizing public policy is a priority for all low-income Americans with or without disabilities. Collaboration and inclusion lessons learned from our non-disability partners should now be applied to the most pressing issue of our day—poverty. We must stand side-by-side with one voice across all diverse segments of our society united by our core truths to work together to design and advance organization sustainability that will create new revenue generating models to continue the critical work of poverty elimination.

Many of our sponsors are asking, “What is the new next big thing?” For many of us in the weeds of this work we know it is a focus on poverty reduction. We know the current challenges to debt at a federal level and budget deficits at a state level require a new set of tools and strategies for the independent sector in its relationship to the public and private sector. Nonprofits are facing unprecedented challenges to continue to advance their missions whether it is related to free tax assistance, alleviating hunger, ending homelessness, lowering unemployment, stabilizing family instability, reducing school dropout rates or stopping crime.

America's future—although uncertain for many—is in good hands when you think about the partners represented in this report. They are both in Washington, D.C. and in cities across the country. National Disability Institute is committed to the social and economic inclusion movement begun by our partners and to the promotion of our mutual core beliefs regarding peer support, economic empowerment and advancement of self-sufficiency for generations to come.



MICHAEL MORRIS, J.D.
Executive Director



JOHNETTE HARTNETT, ED.D
Director of Strategic Partnerships

Thank you
to our partners, volunteers and sponsors
for joining with us
to create a better economic future
for persons with disabilities.

Your passion, dedication
and tireless efforts
make this conversation and movement possible!



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