



2013 Annual Report



Dear friends of AccountAbility Minnesota,

In 2013 we released our five-year strategic plan “Charting the Future: Building Financial Stability for People and Communities.” It’s an ambitious yet exciting blueprint for expanding our scope of work, both in breadth and depth, to foster financial capability among hardworking families.

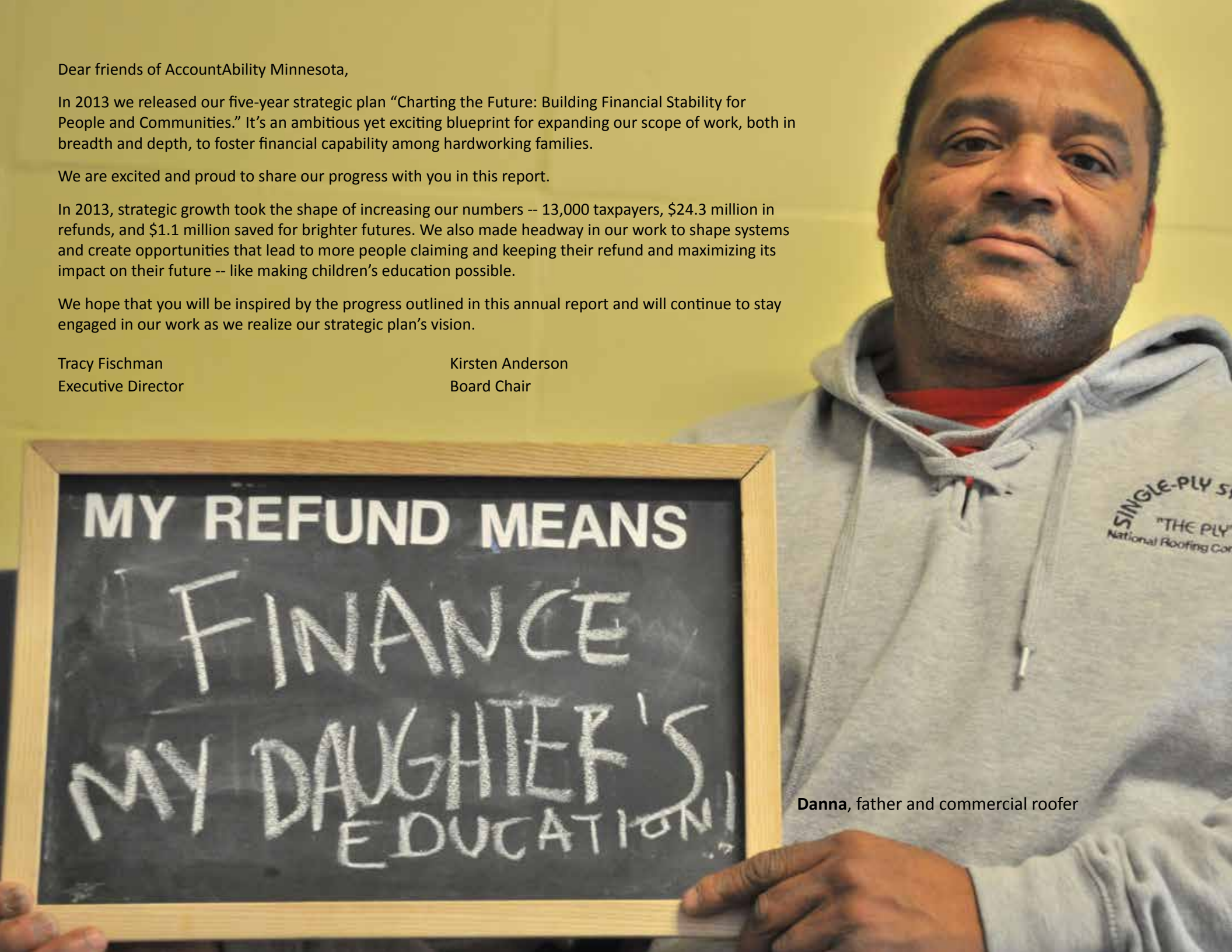
We are excited and proud to share our progress with you in this report.

In 2013, strategic growth took the shape of increasing our numbers -- 13,000 taxpayers, \$24.3 million in refunds, and \$1.1 million saved for brighter futures. We also made headway in our work to shape systems and create opportunities that lead to more people claiming and keeping their refund and maximizing its impact on their future -- like making children’s education possible.

We hope that you will be inspired by the progress outlined in this annual report and will continue to stay engaged in our work as we realize our strategic plan’s vision.

Tracy Fischman
Executive Director

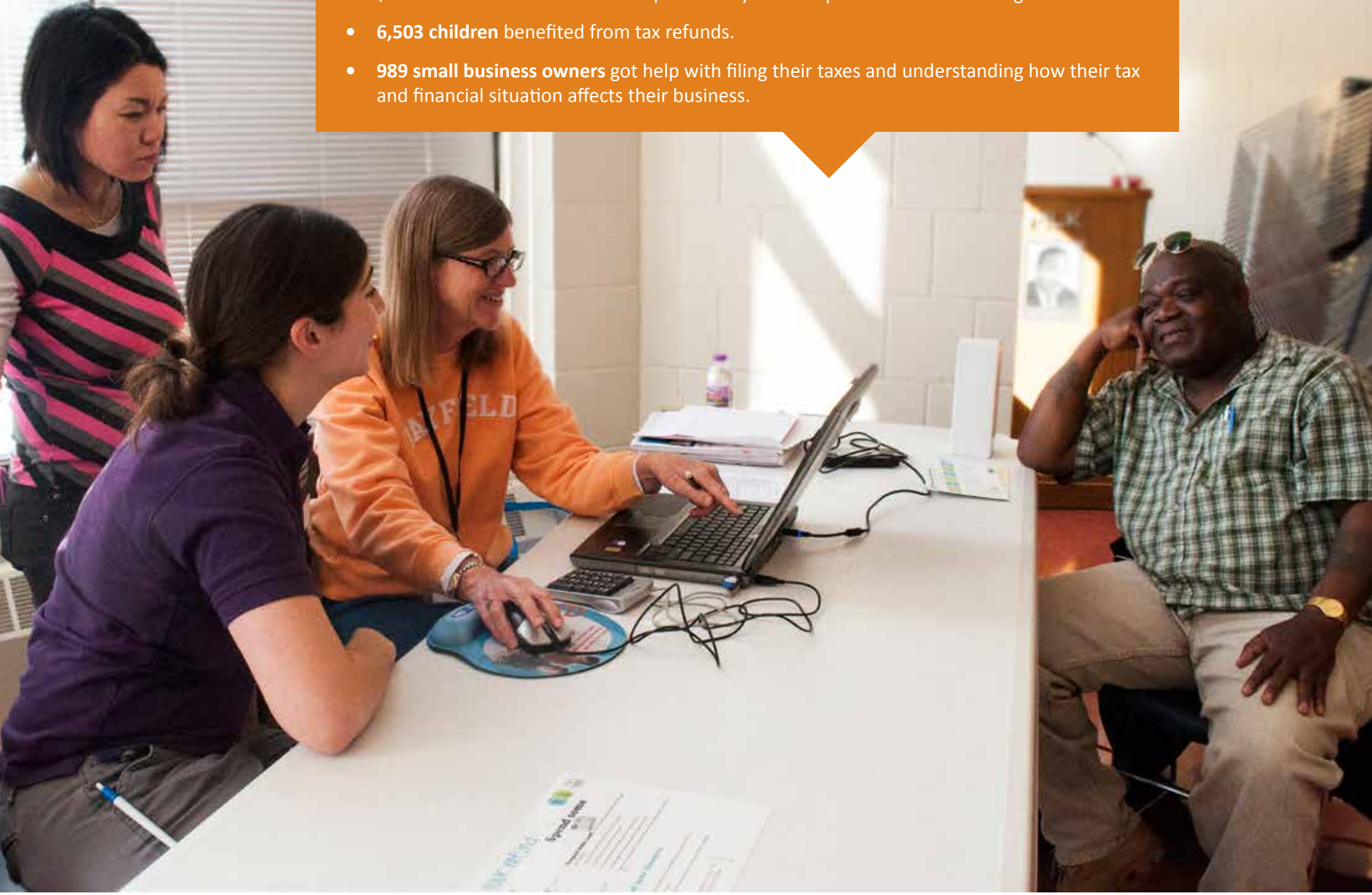
Kirsten Anderson
Board Chair



Danna, father and commercial roofer

Taxpayer Services in 2013...

- **13,231 low- and moderate-income taxpayers** received free tax preparation.
- **\$24.3 million in tax refunds** was put directly into the pockets of hardworking families.
- **6,503 children** benefited from tax refunds.
- **989 small business owners** got help with filing their taxes and understanding how their tax and financial situation affects their business.



A woman with glasses and a black beanie is smiling and holding a chalkboard sign. The sign has the text "MY REFUND MEANS SAVINGS" written on it. The background is a blurred indoor setting with framed pictures on the wall.

MY REFUND MEANS

SAVINGS

Financial Services in 2013...

- **675 taxpayers saved \$1.1 million** of their refunds for emergencies, their children, and more.
- **281 new credit union and bank savings accounts and 885 prepaid debit cards** were opened for our customers regardless of their banking or credit history.
- **\$41,050 in U.S. savings bonds** were purchased by our customers with their refunds directly through their federal tax return form.
- **1,127 taxpayers** had their credit report pulled and received information on how to improve it.

Tajanae, mother and security officer



Andrew and Bonnie,
electrician and homemaker,
parents of a 2-year-old son

Training and Technical Assistance in 2013...

- 12 organizations across the state received training and technical assistance and operated 21 free tax preparation sites.
- Those organizations prepared more than 13,000 tax returns for Minnesotans across the state, some in remote and rural areas.
- We offered a variety of trainings on running effective free tax prep programs, including partnering with the Internal Revenue Service and Minnesota Department of Revenue to train on tax software.



Volunteers in 2013...

- **569 volunteers** gave **23,812 hours** to prepare **27,152 tax returns**.
- Each volunteer tax preparer went through **nearly 20 hours of training** and passed IRS-certification exams.
- Our longest-standing volunteer has been with us since the mid-1970s.

Claim it! Campaign in 2013...

- Materials were delivered to over 250 organizations in more than 100 cities.
- More than 74,000 flyers, posters and stuffers were distributed.
- Hosted tax credit trainings in collaboration with the University of Minnesota – Extension and Mid-Minnesota Legal Aid to ensure service providers around the state understood basic tax credits and how their clients could claim them for free.



Furthering our work to foster financial capability

- We released a five-year strategic plan called “Charting the Future: Building Financial Stability for People and Communities.” It’s an ambitious yet focused plan that reflects the voices of those instrumental to our work and defines our course for creating greater capacity and impact.
- We launched a research-based, social marketing campaign called “Got Some, Save Some” to increase the number of people saving some of their tax refund. With multiple touch points and messages that spoke to saving for emergencies and even a little bit adds up, the campaign motivated 675 people to save \$1.1 million.
- We piloted a matched saving program. A limited number of taxpayers who saved some of their refund received a 50% match after six months. 77% completed the program (44 of 57 enrollees), saving a total of \$69,567 at the end of 6 months. A total of \$19,569 in matching funds was granted.
- Congressman Keith Ellison visited one of our tax sites to learn first-hand about our work to help hardworking families access tax credits and maximize their impact on families’ financial security.
- In September, staff members presented at the National Community Tax Coalition’s bi-annual national conference, “March Forward,” in New Orleans. Amidst networking and sharing best practices with fellow free tax prep providers around the country, staff presented separately on fundraising, integrating savings into tax time, and managing a statewide campaign.
- On November 14’s Give to the Max Day, with a quirky “Cats Doing Taxes” campaign, we raised a record number of donations from individuals – \$37,736. A group of our volunteers and donors came together to create a matching fund of \$17,000. We matched that fund and more with an additional \$20,736 in donations from 238 donors. The “Cats Doing Taxes” campaign was highlighted in two Star Tribune articles.
- With our colleagues, we advocated for two exciting improvements to the state budget for low-income taxpayers. We helped to successfully double the pot of funding (to \$400,000) for Volunteer Income Tax Assistance (VITA) programs across the state to as well as an increase to funding for the Renter’s Credit, which means larger refunds for low-income families.





Institutional Funders

January 1, 2013 through December 31, 2013

\$100,000 and above

Greater Twin Cities United Way
Internal Revenue Service – Volunteer Income Tax Assistance Program
Northwest Area Foundation

\$50,000 - \$99,999

The McKnight Foundation
Otto Bremer Foundation
Thrivent Financial Foundation

\$25,000 - \$49,999

Minnesota Department of Revenue
Minnesota Society of Certified Public Accountants
MNSure
Pohlad Family Foundation
Emma B. Howe Memorial Foundation Fund of The Minneapolis Foundation
The Saint Paul Foundation

\$5,000 - \$24,999

Allianz Life Insurance Company of North America
Ameriprise Financial
Deluxe Corporation Foundation
James A. & Marilyn R. Dodge Fund of The Minneapolis Foundation
The Jaye F. and Betty F. Dyer Foundation
U.S. Bancorp Foundation
Wells Fargo Foundation Minnesota

Up to \$4,999

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Boker's, Inc.
Bremer Bank
C.R. Bard Foundation
Central Texas Express Metalwork
Citizens Community Federal
The Fredrikson & Byron Foundation
Gilligan Foundation
Great River Energy
IBM
Incredible, Inc.
Initiative Foundation
Intuit Financial Freedom Foundation
Liberty Diversified International

Linder's
Local Initiatives Support Corporation
RBC Foundation
Republic Bank
TCF Foundation
Thrivent Financial for Lutherans (Thrivent Employee Political Action Committee)
US Federal Credit Union
Zombie Productions, LLC

In-kind

Minnesota Society of Certified Public Accountants
Brenden & Heather Schaaf

Matching funders

The following donated funds as matching dollars for contributions or volunteer time:

3M Foundation
Ameriprise Financial
Best Buy Co., Inc.
Blue Cross Blue Shield of Minnesota
Brookfield Office Properties
Ecolab
H.B. Fuller Company
JCPenney Company Fund
Medtronic, Inc.
One Beacon
Pohlad Family Foundation
The Dorsey & Whitney Foundation
Thrivent Financial Foundation
Travelers Foundation
United FCS
UnitedHealth Group
U.S. Bancorp Foundation
US Federal Credit Union
Xcel Energy Foundation

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\$1,000 and above

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Tian Xia
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January 1 through December 31, 2013

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Joanne Broady
Harold Coulter
Kathy Dahl
Gwen Denninger
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Leo Gabriel
John Griffiths
Sharon Lovo
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Valerie Martinson
Liz Murray
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Sharon Ramey
Bob Schafer
Jill Schwimmer
Jon Solstad
Charles Sislo
James Smith
Will Sulzbach
Christopher Wittich
Barb Woodruff
Mary Jo Woolf

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R.T. Anderson
Missy Anderson
Mound
Cindy Armstrong
Wayne BJORLIE
Joe Bohlke
Patty Bongaarts
Alan Bongaarts
Dean Bossenecker
Missy Brooks
Jen Buege
Georg Ann Burns
Jerry Carroll
Bob Cox
Thaine Dirks
Bob Dufek
Andrea Eaton
Raymund Flies
Tom Foley

Fabrice Georis
Phyllis Haag
Jerry Halbach
Lisa Hario
Ann Hartmann
Jeffrey Holland
Sue Hults
Krista Isley
Cassie Johnson
Dennis Johnson
Thomas Johnson
Dale Johnson
Bec Johnson
Emily Kaszynski
Mary Katynski-
Johnson
Virginia Keenan
John Kurila
Maya Levitan
Jeffrey Maas
Linda McCormick
Jenna O'Connor
Bob O'Keefe
Lisa Olberg
Dave Olsen
Ruth Olson
Deb Olson
Kim Parta
Bill Patient
Doug Paulson
Chris Pricco
Thomas Prokosch
Kari Pumper
Emily Resseger
Harold Richey
Hilke Riehardt-
Martinez
Diane Rosenwald
Dave Rosewall
Linda Ruecker
Barb Schaepe
Emily Schlosser
Rebecca Sluss
Becca Stark
Holschuh
Ken Stavrum
Kris Stoffel
Jim Stroebel

Mary Thomas
Roger Wambheim
Mary Waters
Bill Werb
Steven Wiley
Steve Willett

Less than 5 years

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Catherine Abbott
Wahib Abdullahi
Ahmed Abdulle
Yohannes Agegnehu
Alicia Aguirre
Sayem Ahmed
Ron Akkerman
Shola Alabi
Alyssa Andersen
Eileen Andersen
Todd Anderson
Cooper Anderson
Taweh Anderson
Kyle Anderson
Matt Arseneau
Charlie Asche
Hana Assefa
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Bethel University

Gordon F. Goodwin
MAP for Nonprofits

Dale F. Johnson
Community Volunteer

Jim Jordan
OneBeacon Insurance Group

Bill Raker
US Federal Credit Union

Jodi Sandfort
Humphrey School of Public
Affairs

Carole Specktor
ClearWay Minnesota

David O. Wiese
Wells Fargo

Scott Wingrove
CHS, Inc.

Staff

Tracy Fischman
Executive Director

Cori Ballew
Volunteer Resources Coordinator

Mekdelawit Bayu
Outreach Coordinator

Amelia Colwell Reedy
Development Manager

Adam Faitek
Donor and Volunteer Relations
Director

Carla Gainey
Senior Director of Tax Services

Aleathea Garry
Technical Assistance Manager

Doris Gruis
Accounting Consultant

Cally Ingebritson
Financial Services Coordinator

Anne Johnson
Financial Services Director

Brian Kao
Operations Manager

Thomas J. Larson
Self-Employment Manager

Anel Mendoza
Office Manager

Stacy Opitz
Marketing and Communications
Director

Katy Schultz
Tax Services Manager

Open
Claim it! Campaign Manager

Open
Financial Inclusion Campaign
Manger

Seasonal Staff

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Customer Service Assistant

Sarah Butler
Financial Services Specialist

Cecilia Clements
Tax Site Manager

Carla Evans
Volunteer Resources Assistant

Heather Frank
Tax Site Manager

Renée Goneau
Self-Prep Assistant

JoAnn Gordon
Financial Services Specialist

Brenda Grove
Remote Tax Prep Manager

Zahra Hassan
Interpreter

Nate Hermanson
Financial Services Specialist

Claudia Holt
Financial Services Specialist

Emily Johnson
Financial Services Specialist

Eric Kiefer
Tax Site Manager

Shantel King
Tax Site Manager

Susan Kirkland
E-File Coordinator

Justin Lassen
Tax Site Manager

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Namibia Little
Financial Services Specialist

Mubarek Lolo
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Interpreter

Nicole Meyer
Financial Services Specialist

Kevin Moua
Interpreter

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Tax Site Manager

Melissa Nguyen
Tax Site Manager

Ify Onyiah
Financial Services Specialist

Michael Osuji
Tax Site Manager

Kari Page
Self-Prep Assistant

Jonas Parra
Tax Site Manager

Leah Pauletti
Tax Site Manager

Adriana Pinner
Financial Services Specialist

Alona Lee
Tax Site Manager

Paul Raymond
Financial Services Specialist

Josie Shardlow
Financial Services Specialist

Nicole Smith
Financial Services Specialist

Angela Sommers
Tax Site Manager

Jovita Stewart
Financial Services Specialist

Cindy Valenzuela
Interpreter

La Vang
Tax Site Manager

Mai Cha Vang
Tax Site Manager

Armando Vilchez
Tax Site Manager

Acacia Willey
Tax Site Manager

Megan Wolle
Financial Services Specialist

Mission statement:

AccountAbility Minnesota is dedicated to providing high quality tax preparation and related financial services to individuals and families of limited means by leveraging volunteer resources and advising and assisting others to provide similar services in their communities.

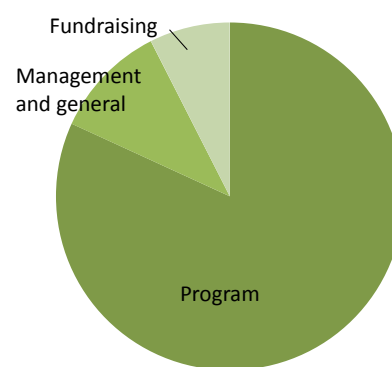
Financial summary

July 1, 2012 - June 30, 2013

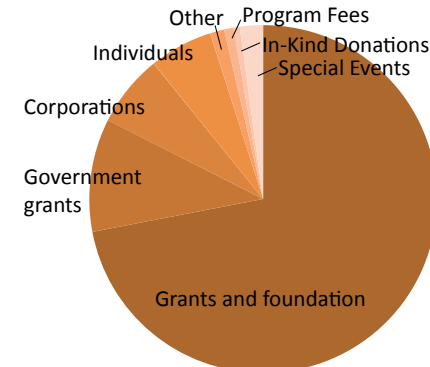
Statement of financial position

ASSETS	FY2013	FY2012
<u>Current assets</u>		
Cash and cash equivalents	\$507,143	\$375,905
Cash - restricted	6,189	6,184
Grants receivable	---	11,950
Other receivable	---	8,640
Other current assets	7,598	7,575
Total current assets	\$520,930	\$410,254
<u>Noncurrent assets</u>		
Furniture and equipment	\$145,278	\$139,612
Leasehold improvements	36,203	36,203
Less accumulated depreciation	(121,625)	(111,202)
Endowment investments	90,271	77,646
Total noncurrent assets	\$150,127	\$142,259
TOTAL ASSETS	\$671,057	\$552,513
<u>LIABILITIES</u>		
<u>Current liabilities</u>		
Accounts payable	\$ 8,749	\$15,825
Accrued expenses	83,163	77,793
TOTAL LIABILITIES	\$91,912	\$93,618
NET ASSETS	FY2013	FY2012
Unrestricted	\$199,648	\$368,798
Temporarily restricted	288,500	11,950
Permanently restricted	90,997	78,147
TOTAL NET ASSETS	\$579,145	\$458,895
TOTAL LIABILITIES AND NET ASSETS	\$671,057	\$552,513

Your investments at work



Sources of contributions



Statement of activities

SUPPORT AND REVENUE*	FY2013
Grants and Foundation	\$1,022,716
Government grants	149,000
Corporations	95,488
Individuals	83,719
Other	18,604
Program fees	12,368
In-kind contributions	8,408
Special Events	30,535
TOTAL SUPPORT AND REVENUE	\$1,420,838
<u>EXPENSES*</u>	
Program	\$1,062,254
Tax Program	\$839,431
Financial Services	\$215,783
In-kind donations	\$7,040
Management and general	138,409
Fundraising	97,277
TOTAL EXPENSES	\$1,297,940