August 2022

Dear Friends,

Happy Summer! Summer is a time we cherish here at Ariva. With our busy tax season behind us, summer is when we can all exhale; it is when we stop and reflect and when we begin planning new projects and programs. And, this summer, we have a lot of plans.

As you’ll read in the following report, our Financial Counseling and Free Tax programs are back to our traditional in-person service model this year. Many of our long term partners are again hosting us in person and we also have some new partners who you’ll read about in the report. And, in the second half of the year, we are launching a new counseling program dedicated to supporting entrepreneurship. In its first year, the project will be based in our West Farms community; over time, we plan on expanding it into additional Bronx neighborhoods.

In May, we celebrated a one year anniversary with M&T Bank as an anchor partner in our collaboration with the Mexican Consulate in New York, La Ventanilla de Asesoría Financiera. The following report talks about some of the exciting work going on at the Ventanilla and profiles a long time staff member there, Sidy Diakhate.

This month, we begin a strategic planning process to help us think through our priorities over the next few years: how can we better serve our clients and expand our reach to those who most need our services? Thanks to a generous grant from the Citi Foundation’s Community Progress Makers program, we have new resources to invest in our programs and in our people. We are expanding our marketing initiatives and social media presence and we are launching a Spanish language website to better communicate with our stakeholders. We are also looking at new ways to better support our staff, many of whom, like Sidy, have been with us for many years. And, as always, we are looking for new partners to host us in neighborhoods around the Bronx.

Many of you reading this report have watched us grow over the years and you have been a part of that growth yourself. After a three year hiatus, we’ll be having our annual celebration, A Toast to Ariva, in person on October 27th. We really look forward to getting together with our friends and supporters again and, in the meantime, we hope you enjoy this report!

Irene Baldwin
Executive Director
Impact to Date

**TAXES**
Helping our community - including families, immigrants, essential workers, and seniors - navigate complex tax filing processes

- **5,800** RETURNS FILED
- **272** APPLICATIONS FOR NEW ITIN NUMBERS
- **92** ITIN RENEWALS
- **1,617** QUALIFIED FOR THE EITC
- **1,441** QUALIFIED FOR THE CHILD TAX CREDIT

**FINANCIAL COUNSELING**
Helping our community achieve financial goals and improve their lives, from securing affordable housing, to starting a business

- **2,000+** PEOPLE RECEIVED FINANCIAL COUNSELING FROM ARIVA
- **970** SESSIONS AT ARIVA'S FINANCIAL EMPOWERMENT CENTERS IN THE BRONX
- **897** SESSIONS THROUGH THE VENTANILLA
- **824** SESSIONS THROUGH READY TO RENT
- **962** PARTICIPANTS AT 18 OUTREACH EVENTS
Inocencio’s Story

Inocencio came to Ariva to file his 2021 tax return, however he did not have access to previous years’ information that we needed in order to maximize his tax refund. We helped Inocencio create an account with the IRS through ID.ME. Once Inocencio was able to share this information with us, we were able to double his refund!

We were also able to print the four years worth of tax returns that Inocencio needed to apply for citizenship. While reviewing previous years tax returns, we determined that the person who prepared Inocencio’s tax return did not maximize his 2020 refund. We were able to file an amended 2020 tax return for Inocencio, securing him an additional refund. Inocencio was so pleased with our services that he recommended us to his daughter and her mother.

Rocio’s Story

“I emigrated to the United States together with my little daughter to join my husband, who had emigrated years before. For many years, I dedicated myself to the home and my family. In 2017 after my youngest son went to college, I looked for opportunities to return to my profession and studied Quickbooks and Bookkeeping while looking for activities to help my community. One day, at the end of 2018, I received an email from the Mexican Consulate where they invited me to volunteer for Ariva.

I was interested, so they gave me instructions to attend an informational meeting. I followed all the steps to register, take the lessons, practices and exams. 2019 was my first year as a volunteer, mostly at the Mexican Consulate. After a brief hiatus, I was able to return to volunteer remotely in 2021 and 2022. My experience with Ariva has given me the opportunity to serve my community and meet good people, and it is an experience that I would definitely repeat and recommend.”
New Locations
The years since the shut down of in-person services due to the pandemic have brought lots of change to Ariva. While we are proud to have reopened many in-person sites with our existing partners, some partner locations closed, or are no longer providing partner services on site due to COVID-related space limitations. To fill this gap in service locations for our community, we have established new partnerships and are opening new locations this year! We will be hosting tax days with our new partner, Webster Bank, at the Allerton branch. We also just launched a new tax site at the Pelham Parkway-Van Nest Library, and, one of our long time tax day partners, PEP for Seniors in Parkchester, will expand to become a full season tax site next year. In all, we expect to operate eleven partner sites during the upcoming tax year.

New Initiative
This year, we launched a very important initiative at our West Farms location - financial counseling for micro-entrepreneurs and small businesses. In response to many requests from our community, we have built these additional supports into our financial counseling offerings. Through this work, we are helping entrepreneurs apply for their Employer Identification Number (EIN), connecting them with DCWP Permits and/or Licenses, and connecting them with resources for capital. We are very excited about the potential of this work and the impact these entrepreneurs will have on our neighborhood as they build their businesses. We hope to expand this offering to other locations in the coming months and years.

New and Improved Digital Communications Strategy
This year, we are making an investment to better connect with both our community and our champions through digital communications strategy with help from our brand & content agency, B Storytelling. Leveraging social media, email, texting, and our own blog, Ariva is consistently promoting all of our work in both English and Spanish for the first time, allowing us to better reach, assist, and work with our clients.

We’re in Your Neighborhood
Meet Sidy

Ariva is a community. We are so grateful for the dedication and support of everyone in this community: our partners, volunteers, donors, and, of course, our amazing staff! Please take a moment to get to know one of our wonderful team members, Sidy Diakhate!

When did you first join Ariva, and what was your first role with the organization?
I joined Ariva in 2011 as a tax preparer. I had just graduated from college and moved to NYC from Richmond, Indiana. Ariva provided the necessary training, and even though I had no background in tax preparation, it didn't take me long to feel as though this was something I had been doing for a while.

What's one thing you enjoy about working at Ariva?
I think that one of the greatest things about Ariva is the opportunity it afforded me. I was a recent college graduate who barely spoke Spanish, with no previous experience preparing taxes, but Ariva took a chance on me. I soon proved myself to be the right choice, and by the end of the tax season I saw an opportunity to advance within the organization and took it.

I joined Ariva’s financial literacy program during its early stages, known at the time as Ri$e Up! Light Up Your Financial Future. Today, as a Senior Financial Counselor, I am proud to have been one of the pioneers of this wonderful program that has helped thousands of people manage their personal finances since its inception in 2012.

None of this would have been possible if I was not given that first opportunity, the same opportunity being afforded to current and former colleagues over the years.

Can you share a story about a time when you saw the impact of your work for a client?
One of the partner sites where I provide financial counseling is the Ventanilla at the Mexican Consulate. Most of the clients at this site are newly arrived immigrants who speak little to no English and have very limited knowledge of the US financial system.

It breaks my heart when I hear their stories of being taken advantage of by predatory financial institutions, or tax preparation agencies who charge them bogus fees for services that they can access for free through Ariva. One experience that always stays with me is seeing the sigh of relief these folks get after receiving my support and realizing that they can count on not just me, but the entire Ariva team.

On days when you’re not feeling inspired, what helps motivate you to come to work?
As an immigrant, I too faced many challenges when I first moved to the US. The services I provide through the Ariva programs, whether taxes or financial capability, are what I wish I had received when I first moved here almost 18 years ago. So, on days where inspiration is needed, I think of the impact I will be making in clients’ daily lives, and that’s plenty of motivation for me.
Financial Empowerment Centers

Our Financial Empowerment Centers have had an active first half of the year. Our three full-time financial counselors have been serving our neighbors at six in-person locations and through remote phone sessions, providing 970 counseling sessions across our Bronx Financial Empowerment Centers.

We have worked hard to engage the community through an increase in outreach activities and new partnerships. We hosted pop-up financial counseling sites with our partners, the Puerto Rican Family Institute and Community School District 7. Our program manager and the counselors have conducted over twenty presentations to numerous community organizations, their members and their staff. We have partnered with international, national, and citywide organizations serving the Bronx like the Red Cross of NYC, Catholic Charities, the International Rescue Committee, Hunger Free NYC, NYC Family Justice Center and Room to Grow. We continue to conduct outreach activities, network, and expand our partnerships to bring more resources to our Bronx community.

The Ventanilla

The Ventanilla de Asesoría Financiera, Ariva’s collaboration with the Mexican Consulate and M&T Bank, had a very successful six months.

From January – June 2022 the Ventanilla delivered a total of 898 one-on-one financial counseling sessions to a total of 645 unique clients. The vast majority of our sessions took place at the Mexican Consulate, and, as our program continued to expand, we also provided services at the Colombian and Honduran Consulates in New York City, and at Mixteca in Sunset Park, Brooklyn.

During this period, we also conducted 8 Facebook Live events with the Mexican Consulate and 15 informational workshops with partners including Mixteca Organization, Qualitas of Life Foundation, Churches United for Fair Housing (CUFFH), St. Jerome HANDS, CREA, Sanctuary for Families, the Consulate General of Colombia in New York, HANAC, and Kingsbridge Heights Community Center. These events covered topics ranging from the importance of filing taxes, how an ITIN can help immigrants take the first step to achieving their financial goals, building credit, credit opportunities for microentrepreneurs, and banking. In addition, we also participated in six street
fairs and events hosted by our partners, including Catholic Charities and the New York Immigration Coalition.

This year, clients are coming to us with questions about filing taxes for the first time, obtaining an ITIN, understanding the Child Tax Credit, opening bank accounts, building credit, preparing to open a business, and strengthening household finances. Our financial counseling team at the Ventanilla has been able to successfully meet the needs of our clients and ensure that we continue delivering high-quality services to immigrant communities seeking to understand the US financial system.

Despite the ongoing restrictions that were put in place to combat the spread of COVID-19, during the 2022 tax filing season and the months after at the Mexican Consulate, the Ventanilla was very successful in serving our community. We filed 544 returns, of which more than 30% received the child tax credit, as well as 145 new ITIN applications, and 58 renewal applications.

In addition to readying clients to prepare their taxes accurately, Ventanilla staff also focused on helping those with tax liabilities either pay their tax debts in full or set up payment plans with the appropriate agencies. They also helped clients with a range of other tax related issues such as dispute letters, refund traces and income verification documents, to name just a few.

Ready to Rent
The Ready to Rent program is aimed at helping affordable apartment seekers across New York City. The program was designed to help in two ways: by helping clients accurately calculate their income to determine eligibility and by ensuring that negative items on a credit report do not lead to being rejected for an apartment. So far in 2022, we have conducted 824 Financial Counseling Sessions to 640 people. We have seen a continued, heightened need for affordable housing throughout the first half of this year. By helping clients calculate their income, we make sure that they are aware of which buildings they can apply for based on their income, allowing them to be thoughtful in their search for housing. By helping clients build their credit, we can review their credit reports and target any areas that could lead to a rejection for affordable housing.

This year so far, we have partner counseling sites in Manhattan, Queens, Brooklyn, and at three Ariva locations in the neighborhoods of University Heights, West Farms, and Highbridge in the Bronx. We also integrated the Ready to Rent program into many of our VITA sites during tax season and offered Ready to Rent at 8 partner sites: the Mexican Consulate, CUCS, POTS, East Side House Jobs Plus, Mixteca, YMPJ, The Bronx Collab, NAICA and Hunger Free NYC. Finally, we continue to offer Ready to Rent services remotely over the phone.

Tax Preparation
This year, Ariva prepared 5800 returns, free of charge, saving our clients tax preparation fees and bringing needed dollars back to the communities we serve. In addition, we helped 272 immigrants apply for new ITIN numbers and we prepared 92 ITIN renewal applications.

Since 2003, we have provided free tax preparation assistance to hardworking New Yorkers through the Volunteer Income Tax Assistance (VITA) program. Ariva’s tax services are important because, not only
do we provide clients with a means to get their taxes done free of charge and get their full refund, but we also help them reach their financial goals and plan for the future. When our neighbors come to Ariva, they not only take advantage of a free service, but they have the opportunity to integrate financial asset building into their plans.

We inspire trust with people of different communities, from undocumented immigrants to seniors to entrepreneurs, and we have the expertise to assist them with different facets of the filing process.

This year, for the first time since Covid erupted, we happily returned to our full capacity of in-person services. This was a huge relief to those in our community with technological barriers who have struggled to access our services virtually. We provided in-person services again at six sites that had only limited services the year before, reopened two sites that had closed due to the pandemic in 2020, and launched a new site in Pelham Parkway’s Van Nest Library.

We also added three new full time tax staff, allowing us to increase the scope of services to include one-on-one customer service to assist with audits, paperwork, identify theft, and payment plans. We also have a new volunteer coordinator and have exciting plans to expand our volunteer recruitment and strengthen our volunteer support.

Looking forward, the tax program will focus on strengthening volunteer recruitment, partnerships, and customer service. We will explore volunteer recruitment at the corporate level and increase internship capacity by creating an internship portfolio. In the last two years, training has been provided completely virtually. In 2022 we are bringing back in-person tax training again combined with our online volunteer training program.

Get Involved

VOLUNTEER
Join a vibrant community of more than 200 volunteers who help Ariva prepare free tax returns for our neighbors in need. No previous experience is needed - we’ll teach you everything you need to know to give back to your community. For more information and to sign up, visit https://ariva.org/volunteer/.

JOIN OUR TEAM
Want to join our amazing team? We are currently hiring for a variety of roles at Ariva. We are proud to create a professional pathway for our staff members and will provide training to the right candidates. You’ll find information about open positions and the links to apply on our blog.

SUPPORT AND CELEBRATE TOAST TO ARIVA WITH US
We will be hosting our first in-person Toast to Ariva since the COVID-19 pandemic on Thursday, October 27th. Save the date, and email ibaldwin@ariva.org if you are interested in sponsorship opportunities. We look forward to celebrating with you!

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