



# Racial Equity Impact Statement

2023-25 Agency Request Budget

# Program Overview



Taxpayer Advocate Office  
Tax Credit Expansion



# Agency Team

Betsy Imholt, Director

Joanna Robert, Communications Director

Codi Trudell, Taxpayer Advocate

Megan Denison, Personal Tax and Compliance Division Administrator

# Level of Engagement

**INFORM**



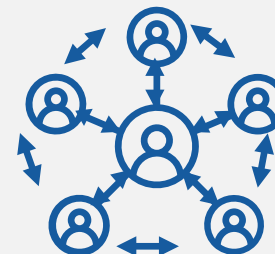
**CONSULT**



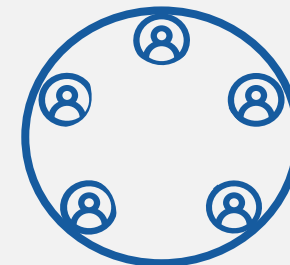
**INVOLVE**



**COLLABORATE**



**EMPOWER**



Taxpayer Advocate Office

Tax Credit Expansion

# Overview of Program ARB Proposals



Expand community  
engagement

# Resource Allocation



Who benefits?

Have we incorporated  
feedback?

# Overview of Feedback

- Heard that we need to be more present in communities
- Shaped our requests for new investments
- Community engagement program policy option package
- New capacity for community engagement and language accessibility

# Data Analysis

## **Taxpayer Advocate Office**

- Served 359 taxpayers to date
- Served 4 taxpayers in Spanish

## **Tax Credit Expansion**

- Over 2.2 million personal income tax returns
- Over 25,500 ITIN returns
- Estimate 20,000 returns with an ITIN may be eligible for the expanded tax credit
- Taxpayer data includes income, dependents, addresses, and language spoken if volunteered
- Taxpayer data does not include race or ethnicity



# Accountability to Community Partners



- Build Relationships
- Listen
- Close the Loop

# Evaluation

## **Taxpayer Advocate Office**

We evaluate the program based on:

- Number of taxpayers served
- Number of taxpayer inquiries
- Number of inquiries resolved
- Number of complex inquiries (cases)
- Number of cases resolved

## **Tax Credit Expansion**

We will evaluate the program based on:

- Number of returns eligible for this new refundable credit compared to estimates
- Tax processing operational metrics



## Thank you

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Betsy Imholt, Director



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