

*Center on Budget and Policy Priorities' Get It Back Campaign*  
**2016 Mid-Tax Season Conference Call**  
 Thursday, March 17, 2016

## **I. 2016 VITA Awareness Day**

*How did VITA Awareness Day go? What events and outreach did you conduct? What proved successful?*

### **Anna Weaver, VITA San Antonio Coalition, San Antonio, TX**

- Conducted public outreach using mass media.
  - Ran PSAs on local radio stations.
    - Developed 60 second PSAs in house that shared the benefits of VITA, how to find a site, qualifications to get help at a VITA site, and available tax credits. The PSA also mentioned VITA can help with prior year returns and amendments.
  - Did paid spots on three radio stations throughout the day.
  - Posted content on Facebook.

### **Cameron Parson, Corporation for Enterprise Development (CFED), Washington, DC**

- Held a policy forum on Capitol Hill that focused on the challenges and opportunities facing low-wage workers at tax time.
  - The event featured five experts from Consumer Federation of America, Intuit, Maryland CASH Campaign, United Way Worldwide, CFED, and the former IRS commissioner.
- CFED released [2015 IRS tax return data](#) for VITA returns that breaks down information on the state and national level.
- Invited everyone on the conference call to sign a letter petitioning for more VITA funding.

### **Ellen Evans, Intuit Financial Freedom Foundation, Washington, DC**

- One takeaway from the policy forum is that some communities have employers that put EITC notification in employee paycheck envelopes to make sure they know about it and to help them claim it.
  - CFED plans to add this to its Assets & Opportunity Scorecard.

### **Alice Delgado, United Way of Pasco County, Land O Lakes, FL**

- Only used social media since VITA Awareness Day fell on Florida's presidential primary day which garnered almost all of the local media's attention.

## **II. Challenges and Successes**

*What have been the challenges and successes of the 2016 tax season so far? If you need advice or have questions, this is great time to ask other outreach partners.*

### **Ellen Evans, Intuit Financial Freedom Foundation, Washington, DC**

- Concerned VITA numbers may be down because taxpayers are waiting on ACA documentation or forms that they need to file their tax returns.

### **Tara Straw, Center on Budget and Policy Priorities, Washington, DC**

- The federal Marketplace said that all 1095-A Forms and corrections were released on time. Some states have reported a few delays, but only by a couple days. The corrections process does takes longer. If forms are delayed in the mail, taxpayers can call and request the information over the phone and don't need to wait for the paper corrections. Electronic copies of forms should be available through the Marketplace, although some people may have forgotten their login info.

**Karla Davis, Goodwill Industries of Tulsa, Tulsa, OK**

- Agreed that taxpayers seem to be confused about 1095-C forms they should have received from their employers. They were told the form would be required to file their tax returns, and now that it seems like they don't really need it, taxpayers are uncertain what to do.

**Tara Straw, Center on Budget and Policy Priorities, Washington, DC**

- There have been concerns about the accuracy of 1095-B and 1095-C forms. It was unclear how they would be used up until the start of the season. The IRS identified many exceptions for this year. In most cases, the forms aren't being used at all.
- If there is a discrepancy between what is on the form and the actual health coverage a taxpayer had, the filer should take steps to correct the form, but this process doesn't need to hold up filing the tax return.
- The affordability exemption has been a challenge for many people. The website [www.healthreformbeyondthebasics.org](http://www.healthreformbeyondthebasics.org) has several resources including:
  - [ACA Examples for VITA and TCE Volunteers](#)
  - [ACA Tax Training Webinar Part III: Comprehensive ACA Examples](#)
  - [Affordability Exemption Primer](#)

**Will Gonzalez, Ceiba, Philadelphia, PA**

- VITA sites often have to correct mistakes and flawed returns filed by paid preparers, especially returns for undocumented immigrants.
- Seen many taxpayers who are exempt from ACA fines that went to paid preparers who didn't know this and were charged. They come to Ceiba's VITA site seeking an amendment and we have to tell them to go back to the preparer and have them correct it since they paid for the service.
- Hope there are policies on a national level that will make private preparers responsible for the filing errors they make.
  - The [National Consumer Law Center](#) and [Consumer Federation of America](#) have several reports on this and continue to advocate for regulation of paid tax preparers.

**Kristy Bice, Goodwill of Central East Texas, Lufkin, TX**

- Has operated a VITA program for eight years and had great success with volunteer retention due to an internship program with the accounting departments at local community colleges and universities.
  - Interns are required to work 20 hours a week for VITA and serve as tax preparers, quality reviewers, and site coordinators.
  - CRA officers are involved in org all year long ask to; CRA officers serve as financial coaches after VITA is done.
- Implements a refer-a-friend program.
  - Returning volunteers who have come back for three or more years invite their friends who might not otherwise volunteer for VITA. This often leads to greater dependability and higher retention since the volunteers are working alongside friends.
- Established year-round partnerships with local financial institutions. Community Reinvestment Act (CRA) officers help with VITA by providing:
  - A source of new volunteers
  - Resources e.g. printers, computers, copiers
  - Financial support
- During the off-season, CRA officers serve as financial coaches for Goodwill's financial literacy initiative.

**Joselyn Feliciano, CEDC, New Bedford, MA**

- Has had great success with recruiting volunteers through the university in a neighboring town.
  - About 50 students apply each year; about 25-35 students pass the test and volunteer.

**Anna Weaver, VITA San Antonio Coalition, San Antonio, TX**

- Has a solid core of volunteers that returns every year.
  - Hold a welcome back breakfast every year in October to get volunteers excited about training and the tax season; end the year with a thank you dinner to show appreciation.
  - Provide incentives for returning volunteers to recruit new volunteers such as gift cards.
  - Hand out certificates to volunteers when they pass a milestone. Every year have at least one volunteer who has been with VITA for 20 or 30 years.
  - Have some year-round services, so encourage volunteers to continue working with them outside of the tax season.

**Roxy Caines, Center on Budget and Policy Priorities, Washington, DC**

- Churches and service groups like rotary clubs and Points of Light are also sources to recruit volunteers.
- Find ways to appreciate volunteers beyond the end of the tax season.
- Get feedback from volunteers through an end of the tax season survey. Addressing any concerns can help increase volunteer retention.

**Pat Sauer, White Earth Investment Initiative, Ogema, MN**

- Encourages new volunteers to serve as greeters.
- Trains them to do a fantastic job which help tax preparers complete their role without interruptions.
- Greeters become confident and excited about serving as tax preparers for the next year.

**Ellen Evans, Intuit Financial Freedom Foundation, Washington, DC**

- Engages Frederick Douglas Academy high school in New York in VITA. Conducts an orientation for juniors and seniors (and some sophomores) on the roles they can serve at VITA sites to help fulfill their community service requirement for graduation. Opportunities include:
  - Greeters
  - Helping at a Facilitated Self Assistance (i.e. help someone establish an email address)
  - Runners (grabbing documents from the printer or making copies)
- These roles are valuable because they help free up time for tax preparers to focus on completing returns.

**Janne Huang, Center on Budget and Policy Priorities, Washington, DC**

- Dons Net Café in Santa Barbara, CA is a group of businesses that has been running a VITA site in the high school for 23 years. High schoolers who go through VITA training can also serve as tax preparation volunteers.

**Lynn Weckworth, United Way of Northern New Jersey, Somerset, NJ**

- Has a wonderful volunteer who is a high school senior in his 3<sup>rd</sup> year at VITA. Will be going to college as an accounting major next year.
- Partners with a local college that is a completely student-run VITA site. Senior accounting majors are the site coordinators and other students are preparers at the site.

### **Karla Davis, Goodwill Industries of Tulsa, Tulsa, OK**

- A local chapter of the Financial Planner Association (FPA) contacted us about seeing clients at the VITA site after reading a newspaper ad.
  - Pro bono outreach is a big part of FPA.
  - Piloted this service on the last Saturday in February.
- The financial planners helped clients identify four unclaimed properties, four unclaimed homestead exemption, plus other individual situations.
- Find the local [FPA chapter](#) near you to try something similar.

### **III. Planning for the Finish Line**

*How do you stay active during the mid-season lull? What outreach strategies will you use to forge through the rest of the tax season? How do retain volunteers between tax seasons?*

### **Anna Weaver, United Way of San Antonio, San Antonio, TX**

- Heavily promote VITA on radio and hold phoneathons for free on local television stations to answer questions about taxes.
  - Organized a group of volunteers and coordinated the time. This year worked with the local ABC and Univision stations.
  - Received a lot of questions about how the ACA relates to tax filing and prior year returns. Also, people wanted to know about locations of VITA sites and documentation needed.
- Promote filing prior year returns and amendments (even if clients didn't file taxes at a VITA site), along with ITINs on paid radio ads.

### **Ellen Evan, Intuit Financial Freedom Foundation, Washington, DC**

- How many VITA sites take appointments? If so, what mechanism do you use?

### **Alice Delgado, United Way of Pasco County, Land O Lakes, FL**

- All of our VITA sites are appointment driven via 2-1-1.

### **Roxy Caines, Center on Budget and Policy Priorities, Washington, DC**

- For those experiencing a drop in clients, there are several things you can do to maximize your time and productivity:
  - Connect clients to other programs and services, especially offerings related to asset building.
  - Do a needs assessment of your VITA program to identify opportunities for improvement.
  - Conduct outreach to potential partners to:
    - Promote sites
    - Host new sites
    - Become a Virtual VITA partner
  - Connect with leads to recruit volunteers.
  - Arrange one time on-site tax preparation at locations like a homeless or domestic violence shelters or employers. If your program doesn't have the capacity to do this, connect with these places to make sure they are aware of your services.
  - Have volunteers develop scenarios and complete mock tax returns that can be used for education and outreach.
  - Learn about volunteers' experiences and why they keep coming back. They can help create pitches to promote and "sell" the VITA experience.
  - Continue to raise VITA awareness and help people learn the value and impact of the service by using the 2015 IRS VITA data from CFED.
  - Develop messages for the end of tax season that encourage people to come to your site now to avoid the lines and beat the rush.

## IV. Announcements

- The Get It Back Campaign recently launched a:
  - Facebook page – [www.facebook.com/GetItBackCampaign](http://www.facebook.com/GetItBackCampaign)
  - Blog – [www.eitcoutreach.org/blog](http://www.eitcoutreach.org/blog)
  - Revamped website – [www.eitcoutreach.org](http://www.eitcoutreach.org)
- Stay up-to-date on the latest EITC and VITA outreach news and strategies by connecting with us in these places.
  - On the [blog](#) and [Facebook](#), we post lots of graphics and blogs that you can share with clients like the [Top Six Reasons to File Your Taxes for Free](#) or [Ten Facts You Didn't Know about the EITC](#).
  - Facebook is also a great way to connect with us and with each other.
- We are here to help! [Contact us](#) to:
  - Request a resource for your tax credit outreach efforts
  - Get support with an outreach concern
  - Ask an unanswered question from the call
  - Share how the call helped you and suggestions for future calls