

**Virtual Training Series**

# Leveraging Partnerships to Fundraise for VITA Programs

**Center on Budget & Policy Priorities**

November 30, 2017

Kate Hermann Stone  
*Ladder Up*

Kathy Matthews  
*Enterprise  
Community Partners*



Tax Credits  
for People  
Who Work

# Virtual Training Series

- Features the expertise of campaign partners in the field
- Focuses on specific outreach strategies and skills that you can begin to apply to your work immediately



# FUNDRAISING THROUGH



**TAX-A-THON**

The logo features the words "TAX-A-THON" in a bold, yellow, three-dimensional font. The letters are slightly slanted and have black outlines. They are set against a circular background that is filled with a blue halftone dot pattern. The entire logo is contained within a thin black circular outline.

# LADDER UP TAX-A-THON 2017

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## Goals

Build  
excitement  
around tax  
season

Raise  
funds

Drive  
volunteer  
participation  
in February



# LADDER UP TAX-A-THON 2017

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- Unit-based peer-to-peer fundraising
- High-dollar donor pledges
- Prizes for volunteers



# UNIT-BASED PEER-TO-PEER FUNDRAISING

- Volunteers created pages on Anython.com
- Gives donors the option of making a donation per volunteer session or make a flat donation
- Website also provides social sharing tools and e-mail templates.

The screenshot shows a fundraising page on the Anython website. At the top, there's a navigation bar with links for "HOW IT WORKS", "APPLY NOW", "FIND AN EVENT", "HELP", and "LOGIN". The main title of the page is "LADDER UP TAX-A-THON 2017". Below the title, it says "FOR: LADDER UP'S PROGRAMS" and "♀ Tax Sites in Chicago and its surrounding suburbs". A large photo shows a woman standing next to a red ladder. To the right, a progress bar indicates "\$4,041 RAISED OF \$2,500 GOAL". It also shows "PLEDGE PER: TAX SESSION". There are buttons for "DONATE NOW", "SHARE", and "PARTICIPATE IN THIS THON". Social sharing icons for "EMAIL ORGANIZER", "Like 769", "SHARE", and "TWEET" are also present.



# UNIT-BASED PEER-TO-PEER FUNDRAISING

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10 Volunteer  
Pages

90 Total  
Donors

\$4,041 in  
donations

Pledge Type	# of Pledges	Pledges Total	Avg. Total Gift
One-time	55	\$2,519	\$45.34
Per session	35	\$1,522	\$43.38



# UNIT-BASED PEER-TO-PEER FUNDRAISING

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Participant	Donors	Total Raised
RC	25	\$1,135
JL	25	\$1,088
KH	13	\$633
JT	10	\$413
CS	5	\$335
AP	8	\$313
MG	1	\$100
SC	1	\$6
AS	1	\$4
BM	1	\$4
<b>Grand Total</b>	<b>90</b>	<b>\$4,041</b>



# HIGH-DOLLAR DONOR PLEDGES

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- Asked donors to pledge to donate \$X per tax return completed on Saturday\*
- When making requests, we estimated the total donation based on previous year results.
- Targeted donors included current and former board members, high-dollar donors, lapsed donors.

\*For 2018, we're making this a pledge per session any day of the week



# HIGH-DOLLAR DONOR PLEDGES

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Donor	Week 1		Week 2		Week 3		Week 4		TOTAL
	550 Returns Completed	Pledge Per Return	544 Returns Completed	Pledge Per Return	544 Returns Completed	Pledge Per Return	501 Returns Completed	Pledge Per Return	
BC	\$0.25	\$137.50	\$0.25	\$136.00	\$0.25	\$136.00	\$0.25	\$125.25	\$534.75
BM	\$0.50	\$275.00	\$0.50	\$272.00	\$0.50	\$272.00	\$0.50	\$250.50	\$1,069.50
CC	\$0.50	\$275.00	\$0.50	\$272.00	\$0.50	\$272.00	\$0.50	\$250.50	\$1,069.50
KP	\$0.25	\$137.50	\$0.25	\$136.00	\$0.25	\$136.00	\$0.25	\$125.25	\$534.75
NN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.25	\$136.00	\$0.25	\$125.25	\$261.25
JM	\$0.00	\$0.00	\$0.00	\$0.00	\$1.50	\$816.00	\$2.25	\$1,127.25	\$1,943.25
TOTAL	\$1.50		\$1.50		\$3.25		\$4.00		\$5,413.00



# PRIZES

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**Weekly drawing of three names for anyone who attended a session during that week**

- Prize: Bag of fancy coffee, Ladder Up Hat, Travel Mug

**At the end of the month,** we drew three names from a list of people who had completed two or more sessions.

- Prizes Included: Amazon.com gift card, target gift card, and admission for two to Ladder Up's Annual Casino Night & Silent Auction Fundraiser



# COMMUNICATIONS

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Volunteer  
Postcard

Weekly  
Volunteer  
E-mail  
Newsletter

Social Media  
Posts



# COMMUNICATIONS

## Postcard – Mailed First week of February



### WHAT IS TAX-A-THON?

February is our busiest month for taxes and we want to make the most of it!

### YOUR VOLUNTEER TIME WILL HELP FUND OUR PROGRAMS

On average, a volunteer returns \$4,700 in refunds to clients during a single tax session. In February, your volunteer time will also help fund Ladder Up's programs, as the organization has a donor group that will donate \$1.50/return completed on Saturdays in February. Sign up today for February sessions at [goladderup.volunteerhub.com](http://goladderup.volunteerhub.com)!

Sign up to volunteer so we can serve as many clients as possible and to maximize the offer from these donors.

### INCREASE YOUR IMPACT

You can also raise funds through Tax-A-Thon! Reach out to friends and family to ask them to make a pledge for every volunteer session you attend in February. To set up your fundraising page, visit [anython.com/event/0120/participate](http://anython.com/event/0120/participate).

### PRIZES

Did we mention that there are prizes? Throughout February, we will have weekly drawings and a grand prize drawing at the end of the month.

Visit [goladderup.org/tax-a-thon](http://goladderup.org/tax-a-thon) for more information!



233 S. Wacker Drive, Suite 4620, Chicago, IL 60606



# COMMUNICATIONS

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## Volunteer Newsletter

**THANK YOU**

to everyone who helped make the first  
Tax-A-Thon Saturday a success!



# COMMUNICATIONS

## Volunteer Newsletter

### TAX-A-THON!



February is our busiest month for tax preparation, and like our clients who are always doing more with less, we want to be sure to make the most of it.

#### SIGN UP FOR TAX SESSIONS:

Please consider [signing up here](#) for multiple sessions in February!

#### WIN PRIZES:

This week's prize winners volunteered at  
**WIC-Armitage, WIC-Kedzie, & DeVry Education Group!**

Volunteers are automatically entered into a weekly drawing each time they volunteer in February.

Volunteer for 2 or more sessions during February to be entered into a drawing for one of three grand prizes.



# COMMUNICATIONS

## Volunteer Newsletter

### MAKE THE MOST OF YOUR FEBRUARY SESSIONS

Let your family and friends know about the great work you're doing for Ladder Up's clients!



You can reach out to friends and family and ask them to make a pledge for every volunteer session you attend in February, just like you would for a walk-a-thon. [Click here to set up your fundraising page!](#)

Special shout out to [Roxanne Chow](#), who has already raised over \$650!

To support Tax-A-Thon you can support one of our volunteers who has already created a fundraising page. Peruse fundraising pages [here](#)!



# COMMUNICATIONS

## Social Media Posts



LADDER UP  
Published by Hootsuite [?]  
Like This Page - February 3 - 0

You can raise funds through Tax-A-Thon! It's too cold in Chicago to run a marathon in February, but you can reach out to friends and family and ask them to make a pledge for every volunteer session you attend in February, just like you would for a walk-a-thon.  
Share your passion for helping tax clients with your network while helping Ladder Up raise critical funds to help ensure it can continue to deliver benefits to families.  
Click here to set up your fundraising page!  
<http://ow.ly/U7Q308zIOE>

Tag Photo Add Location Edit

Like Comment Share

1 Write a comment...



# CHALLENGES

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- Short planning period
  - Not a lot of time to ask donors for pledges
  - Not a lot of time to recruit Anython Participants
  - No kickoff event
- Explaining the donation structure
- Anython's high processing fees
- Getting Prizes to winners was difficult



# CHANGES FOR 2018

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## Starting Earlier

- High dollar donor solicitation efforts began in October
- Peer-to-Peer fundraising will be promoted with training
- Volunteer Postcard will go out earlier

## Kickoff Event

- Double tax session the first week of February
- Local media and VIPs will be invited
- Extra treats and prizes for clients (drawings, kids corner, etc.)
- Perks for volunteers



# QUESTIONS?



# Fundraising with Financial Institutions

Presented by the Cuyahoga EITC Coalition



Cuyahoga EITC Coalition

# What are the benefits of a partnership with financial institutions for the Coalition?

- **Funding for special events:** Super Refund Saturday events and Tax-a-thons
- **Funding for specific need:** niche marketing, new site start-ups, operating support for sites in targeted neighborhoods
- **Potential volunteers**
- **Unrestricted:** More likely to provide unrestricted funding and can be used for matched funding if needed
- **Numerous partnership opportunities**
- **Bringing bank product and services to an underbanked population**

# What are the benefits of a partnership with the Coalition for financial institutions?

- **It's meaningful:** bank employees participate in community-based activity
- **Corporate responsibility goals:** Banks goals match with Coalition's goals
- **Benefit families and the economy:** By investing in the Coalition, the bank is able to support a program that provides benefit to low-and-moderate income families as well as local economy
- **Visibility and recognition throughout the community:** enhances credibility and builds trust
- **Opportunity to discuss banking products and services**
- **Opportunity to demonstrate investment in low-and-moderate income neighborhoods**

# What is the Community Reinvestment Act (CRA)?

- **Enacted in 1977, the CRA is a result of community groups organizing against historical practices of housing and banking discrimination in low-income urban neighborhoods**
- Addressed a discriminatory practice called *redlining* that had become entrenched in federal housing policy and was used to deny or raise the cost of loans to low-income and minority borrowers
- Intended to encourage financial institutions to create equal investment in all communities and meet the credit needs of the communities in which they operate, including low- and moderate-income neighborhoods
- <https://www.youtube.com/watch?v=rdOpsTLvbeY>

# Why does the CRA matter to you?

- **Banks have a strong incentive to invest in the communities VITA intends to serve**
- Your program provides an ideal opportunity for banks to facilitate education and provide other financial-related services to underserved individuals
- You can provide both quantitative and qualitative data that demonstrates the benefit of a bank investment that works towards meeting CRA requirements

# Before you make the ask

- **Talk to neighboring VITA groups**
- **Build off past success**
- **Research**
  - New financial institutions in the market
  - Branch openings or closings
  - Mergers/Acquisitions
  - Community Benefit Agreements

# Making the ask

- **Do not overlook any costs as you consider what to ask (aka don't sell yourself short)**
  - Include fixed costs (e.g. personnel costs)
  - Include new costs (e.g. computers, supplies)
  - Include event advertising
  - Be consistent with what that neighboring VITA tax site is asking for (you are not competing for funds)
- **Don't give anything away**
- **Be consistent with your ask amongst bank partners in your region, it's a small world**

# Making the ask - continued

- Depending on size and geographic service area, **give banks multiple funding levels to consider**
- **Send request with a cover letter** that describes your organization and include a specific funding amount, but still provide other levels of support for their consideration

## Sustainer Support Partner - \$20,000

Sole sponsorship of a Super Refund Saturday, a free tax preparation event that raises tax credit awareness, while bringing together partner organizations to serve a large number of taxpayers with expanded free services such as health screenings, financial counseling and education, homebuyer resources, and more.

- c. Your organization will be included in all Super Refund Saturday marketing, including:
  - i. Neighborhood flyers and posters
  - ii. Communitywide newsletters and newspaper advertisements
  - iii. Neighborhood level mailings
  - iv. Recognition of your sponsorship placed on the cover letter of every tax return prepared at the event
  - v. Super Refund Saturday specific press releases
  - vi. Social media posts through Facebook and Twitter
- d. The estimated impact of a Super Refund Saturday in 2017:
  - i. Over \$X in refunds
  - ii. X families claimed the Earned Income Tax Credit
  - iii. X tax returns completed, positively impacting X family members

# What to do when banks commit to funding?

- Send **personalized thank you note** to person who advocated on your behalf
- Send **thank you** to head of bank foundation or head of department that authorized the grant or sponsorship
- Recognize bank in **press releases**
- Recognize bank on **social media**
- Include bank logo on **marketing materials, website**, etc.
- Include bank logo on **signage at event or site**
- As soon as possible after event, **send email that summarizes event results**
- Send **year-end thank you letter** that summarizes event results and overall results from tax season

# What to do when banks don't commit to funding?

- Keep in touch and **keep trying**
- Invite bank representatives to **celebration events**
- Keep bank representatives current with **significant accomplishments or milestones achieved, e.g. one-page overview**
- Send email(s) with relevant information about trends or insights around EITC and VITA benefits

# Ongoing relationship management with bank partners

- Invite bank representative to participate in event **pre-planning and post-event review meetings**
- Invite bank representative to join your **advisory group or steering committee**
- Keep bank representatives current with significant accomplishments or milestones achieved, **e.g. one-page overview**
- Send email(s) with relevant information about trends or insights around EITC and VITA benefits
- Invite bank representatives to **celebration events**
- **Set-up regularly scheduled meetings to share progress and insights** on how your group is improving its outreach and services for low and moderate income families

# Lessons Learned

- **You can never say thank you enough**
- **Personalize the relationship** to the greatest extent possible, e.g. some people like in-person discussions, others prefer email communications, some are data wonks, etc.
- **Deliver on what you say you are going to do**
- Use all resources necessary to make bank sponsored events run as smoothly as possible; **you can never plan enough**
- **Take time to celebrate together**, everyone likes to be part of a winning team
- **Pay attention**, people move from bank to bank rapidly

# Questions?

# Upcoming Training

**Thursday, December 7, 3:30pm EDT**

Communally (formerly The Benefit Bank) will present “Tax Time Solutions for Long-Term Financial Stability.”

[www.eitcoutreach.org/category/blog/events/](http://www.eitcoutreach.org/category/blog/events/)

# Thank You for Joining! Stay Connected

- Website: [www.eitcoutreach.org](http://www.eitcoutreach.org)
- Blog: [www.eitcoutreach.org/blog](http://www.eitcoutreach.org/blog)
- Facebook: [www.facebook.com/getitbackcampaign](http://www.facebook.com/getitbackcampaign)
- Tax Credit Outreach News: <http://eepurl.com/bo6ra5>
- Email: [eitcoutreach@cbpp.org](mailto:eitcoutreach@cbpp.org)