

**Taxathon Planning Worksheet and Timeline**

*Presented by the Center on Budget and Policy Priorities’ Get It Back Campaign*

**Directions:**

Use this document to help you prepare for your taxathon event. Complete as much of it as you can before the Support Session on September 14. Review the [Taxathon Training](http://www.eitcoutreach.org/blog/organizing-a-taxathon-recording/) and [Taxathon Toolkits](http://www.eitcoutreach.org/outreach-strategies/materials/organizing-a-taxathon-resources/) for ideas and sample materials.

Forming a planning committee may help you better manage all the components of organizing a taxathon. We suggest holding a kick-off meeting in September (or as soon as possible). This will be a good time to flesh out the details in this planning worksheet.

Please let Janne Huang know if your organization plans on doing a taxathon.

**1. Logistics**

Date and hours (preferably in February):

Location(s) (rain location if outdoors):

Budget (how much do you currently have to spend, and how much can you get donated?):

Number of volunteers needed:

**2. Goals**

What are your goals for your taxathon?

How many people do you want to serve?

What is the total amount of tax refunds you want to tax filers return during the event?

What are your media coverage goals?

**3. Partners**

Who will you reach out to for the taxathon?

How do you want them to participate in the Taxathon/ what is their role?

Who will be reaching out to partners, and how (phone, email, meeting, etc.)?

**4. Engagement and Atmosphere**

a. Making it Fun:How will make your taxathon fun and different from a regular tax filing day? Consider playing fun music, providing snacks, using a result board, and/or taking pictures of participants for social media.

Will you hold a kick-off event/countdown before the event starts and/or take a picture/celebrate during the last hour of the taxathon?

b. Engagement:How will you engage the various groups attending the event (taxpayers, volunteers, and partners/funders)? What activities will you plan?

**5. Media**

a. Earned Media: What media outlets will you invite?

Who will be your point-of-contact?

After deciding these details, draft a media advisory and write some talking points. Example media advisories are included in the [Taxathon toolkit](http://www.eitcoutreach.org/outreach-strategies/materials/organizing-a-taxathon-resources/).

b. Social Media:Who will take and post pictures on social media? Create a plan and use the hashtag #taxathon throughout the event.