

## Taxathon Resource Fair Project Overview

### Process

1. Consult with internal stakeholders about who to invite (also email Geoff from DABC)
2. Review list of last year's participants
3. Create invitation list
4. Verify space limitations w/ Courtney (how many tables can we make available to organizations?)
5. Draft email invitation to organizations (*please let me review before sending*)
  - a. Include event overview, # of people expected, goal (200 returns in 12 hours), ideas about how to engage tax filers, mention passport to get people to visit booths, options for participation if they can only attend part of the day include brief day of logistics (check-in, time, etc.), ask for confirmation of attendance, contact info. For person hosting table/booth
6. Send initial email; follow up by phone if necessary
7. Once we have confirmed attendees, send reminder two weeks prior to event w/ more detailed logistics

### Initial Invitation

Good morning \_\_\_\_\_,

As tax season approaches, The Piton Foundation is gearing up for our annual Taxathon--12 hours of free tax preparation for Coloradans with annual incomes of \$54,000 or less.

The Taxathon will take place at Denver's Mile High United Way and will be open Saturday, February 3 from 8:30 a.m. - 8:30 p.m. This year, our goal is to complete over 200 returns in 12 hours, and we expect over 300 people to attend this event--including many families.

I wanted to reach out and invite you to participate in our Taxathon resource fair. At the resource fair, tax filers will have the opportunity to engage with a variety of organizations and learn about community resources. We plan on providing each tax filer with a resource fair passport (and prize for filling it out) to encourage participants to talk to representatives at every booth.

Taxathon is a really great event and we would be thrilled to have your organization represented at the resource fair. If you're interested in participating, please let me know and I will pass along more information about logistics (check-in, details, etc.)

Please don't hesitate to reach out if you have any questions.

Best,

Alicia

## Follow Up Email

Good morning **NAME**,

I wanted to follow-up with you with logistics for the Taxathon Resource Fair. I've attached the details of the event for your review. I'm also passing along our Taxathon [event flier](#), so you can share it with people in your network who work with families who may benefit.

Also, it would be wonderful if you could tell me what time you plan to arrive and leave the event, so that we can plan accordingly.

We are really looking forward to having **NAME** at this year's Taxathon. Please don't hesitate to reach out if you have any further questions.

Best,  
Alicia

## Tracking Outreach

Organization	Contact	Reached Out	Confirmed
DU's LITC	Erin Stearns	Sent Logistics 1/24	Confirmed
Hunger Free Colorado	Michelle Ray	Sent 1st email 12/18	Unable to attend
Center for Workforce Initiatives	Katrina Wert	Sent Logistics 1/24	Confirmed
KeyBank	Debbie Trujillo	Sent logistics to Geoff (DABC) to send to KeyBank 1/24	Confirmed
Taxpayer Advocate Service	Jennifer Culver	Sent Logistics 1/24	Confirmed
Denver Scholarship Foundation	Latia Henderson	Sent 1st email 12/18, checking to see if they can participate, send social media / newsletter blurbs. Sent 2nd email 1/4	Confirmed
Wells Fargo	Steven Carlson	He was in transition but will put us in touch with the right person, Sent 1st email 12/18, Sent 2nd email 1/4	Unable to attend

Mile High United Way	Fermin Avila	Sent Logistics 1/24	Confirmed
Mpowered	Lori Nolen	Sent Logistics 1/24	Confirmed
Re:Vision	Antonio Soto	Sent Logistics 1/24	Confirmed
Metro Caring	Emma Moore	Sent 1st email 12/18,	Unable to attend, putting me in contact with another org. that may have SNAP enrollment