

2018 Taxathon Run of Show

Saturday, February 3rd,
Event time: 8:30 am - 8:30 pm
Expected hours for staff 7:45 am – 9:00 pm
Mile High United Way, 711 Park Ave. W, Denver, CO 80205

Staff Roles/Responsibilities:

Media/VIP POC - Kelly lead

- Receive any media or VIPs that visits the site
- Hand out press/visitor packets
- Give tour as needed:
 - Overview of both Taxathon and our programs
 - Recognize partners
 - Importance of free resources
 - Stats about EITC
- Help set up interviews with taxpayers, students/volunteers, site coordinators, etc. as requested
- Take pictures if photographer isn't available

Volunteer and Partner POC - Alicia lead (Sasha and Courtney for Tax Volunteers)

- Welcome volunteers as they arrive
- Sign them in and hand out name tags
- If they are a tax volunteer, send them to Courtney and/or Sasha in tax room
- Assign volunteers to a position based on need and give them a quick overview of their responsibilities
- Give client story prompts and release forms to story collectors.
- Review the location of the bathrooms, volunteer break room, and kitchen area
- Take pictures of volunteers throughout the day
- Assign breaks as needed
- Be overly thankful!

Social Media POC - Brooke

- Handle day-of posts to facebook and twitter.
- Use set hashtags #taxathon
- Share pictures, quotes, and goals
- Retweet, like, or share other partner posts
- Encourage taxpayers to fill out client story wall

Client Engagement POC - Brooke

- Update goal chart
- Encourage taxpayers to fill out client story wall
- Take pictures throughout
- Collect longer stories
- Distribute and collect all photo and story release forms

Site Coordinators (Courtney, Sasha, Geoff, and Solomon)

- Assign tax volunteer roles
- Answer tax questions
- Control the flow of taxpayers through each step
- Transmit returns
- Track # of returns, refunds, EITC refunds, and savings for goal update

Kids Corner POC - Carley

- Monitor the kid's station
- Manage volunteers assigned to station
- Blow up balloons, reprint coloring pages, keep organized

Additional responsibilities and reminders for all staff:

- Remember, this is a team effort! Assist when help is needed, even if it isn't under your role.
- Pick up trash and take out garbage as needed
- Keep break room and kitchen clean
- Help break down rooms and tables as we near the end of the event
- Answer questions from volunteers and taxpayers or connect them to a person that can help.
- Say thank you to volunteers/students as often as you can. Words of affirmation is often the easiest and most well received display of appreciation

Volunteer Roles/Responsibilities:

Listed below are the various volunteer roles for this year's Taxathon (Desired number of volunteers during each shift)

- Tax Screeners, preparers and quality reviewers (Optimal amount would be 40 but we wouldn't turn away extras): IRS certified students and volunteers screening, preparing and quality reviewing taxes. Must be certified for tax year 2017 and provide the Volunteer Agreement (form 13615) before performing this role.
- Translators (5): Assist in translating at the greeting station and when needed during the tax preparation process. Most common languages include Spanish, Vietnamese, Russian, Nepali, Amharic, French, and Chinese. If you are proficient in any of these languages please let Taxathon organizers know ASAP.
- Greeters (3): Welcome taxpayers at the greeting table. Check to see if they have an appointment or are walk-ins. Ask if they have their photo I.D., social security cards (or ITINs) and tax documents before signing them in. Give them intake/interview sheet (form 13614), partner passport, a pen, and direct them to the waiting room. Let them know a rough estimate of when they should be called. In addition to signing in taxpayers you will also answer general questions like bathrooms, parking, wait time, etc. 1 Greeter will be used to track progress of taxpayers through process and let tax preparers know who is next for each step.
- Tracker (2): Use Trello to keep track of taxpayer's progress through the tax preparation process. Screeners, tax preparers, and quality reviewers will ask who to call next and will report when a taxpayer is ready for the next step.
- Kid's station (2): The event will have a kids table with crayons, coloring sheets, and balloons. Engage with children in the waiting room, pass out these materials, try to keep table organized and fun!
- Story Collectors (4): Each year, The Piton Foundation collects stories from families visiting the free tax site to help get a picture of the importance of free tax assistance and important tax credits. These stories are used to support legislation that supports hard-working low-income families. They may be published on social media to promote tax sites. Volunteer story collectors will use a story collection prompt and release forms to collect information about taxpayers. Volunteers selected for this role should feel comfortable talking openly with families about difficult financial situations and be empathetic to their story.

**Sample Run of Show
(Reduced from original)**

Time	Task	Who	Where
7:45	<ul style="list-style-type: none"> Security lets staff into building Greet resource partners as they come in, point them to Brad R. Busse Board Room after getting badges from Brooke 	<p>All</p> <p>Alicia to greet partners as they arrive</p>	MHUW
7:45-8:15	<ul style="list-style-type: none"> Setup volunteer sign-in table Einstein's will deliver food between 8:00 and 8:15 Setup food in kitchen and/or breakroom Hand out partner badges 	Alicia/Brooke	Foyer, Kitchen, and Volunteer breakroom
7:45-8:15	<ul style="list-style-type: none"> Setup Greeting table (laptops, intake sheets, client folders, 2 chairs, 2 tables) 	Sasha	Foyer
7:45-8:15	<ul style="list-style-type: none"> Boardroom setup: Check to make sure the room is ready to go. <ul style="list-style-type: none"> Blow up balloons Pull up bumper slides on laptop Put out snacks and drinks 	Carley	Brad R. Busse Board Room
7:45-8:15	<ul style="list-style-type: none"> Tax Site room setup: make sure all laptops and printers are on and plugged in 	Courtney and Erica	Conference Rooms and Computer Lab
7:45-8:15	<ul style="list-style-type: none"> Hallway signage: Make sure all signage is in place <ul style="list-style-type: none"> Put out post it notes and pens for engagement wall 	Kelly	Hallway
8:15	<ul style="list-style-type: none"> Quick group shot for social media 	Brooke	Foyer
8:15	<ul style="list-style-type: none"> Doors can open to waiting taxpayers once setup is complete 	Courtney to talk to security guard	Foyer
8:00-9:00	<p>Volunteer Check-In</p> <ul style="list-style-type: none"> Welcome and thank volunteers Greet Tax Site partners, give them name tags and point them to the board room. Greet volunteers, give name tags, have them sign in, point out where breakfast/breakroom is located. 	Alicia and Erica	Foyer

	<ul style="list-style-type: none"> Send tax volunteers to main conference room where Sasha and Courtney 		
8:30	Taxathon is open to the public!	Everyone	Foyer
8:30 a.m.- 8:30 p.m.	Take pictures of event w/regular camera. Shots of: Volunteers together, getting ready; people near the engagement wall; the engagement wall itself; the kids table; pics of outside; be on call for any VIP pics.	Kelly and Brooke	Throughout
8:30 a.m. - 8:30 p.m.	Client engagement <ul style="list-style-type: none"> Help people engage with engagement wall and collect longer stories before quality review. Collect and post social media Take picture of people who share if they allow it. Ask if you can follow up later if they don't want to share today but would like to share later. 	Brooke and available story-collector volunteers	Hallway or private room if requested and available
8:30 a.m. -8:30 p.m.	Operate Kids Station <ul style="list-style-type: none"> Use puzzles, coloring sheets, balloons, and snacks Show people where they can leave their partner passports Pick up trash as needed 	Carley	Busse Board Room
9:00 am	Ask to take picture of first taxpayer of the day, post to social media. Could be them with their post-it for "What will you use your refund for?"	Brooke or Kelly	Hallway
9:30 am - 1:30 pm	Photographer - Cyrus McCrimmon	Kelly	Check-in Table
11 am - noon	Senator Angela Williams	Kelly	Lobby
11:15 am	Put out afternoon snack in Board room, break room and replenish water, coffee, etc. as needed. For other rooms, ensure trash is empty, areas picked up. <ul style="list-style-type: none"> Jimmy Johns will arrive between 11:45am and noon 	Alicia and Erica	Boardroom, kitchen, and breakroom
1:50-2:20	Mayor Hancock arrives	Kelly/Courtney	Lobby (tour site)

2:00-2:30	Update goal chart. Ask site coordinator (Courtney, Sasha, Solomon) for updated: <ul style="list-style-type: none"> Tax return count 	Brooke or Kelly	Hallway
4:30 pm - 5:00 pm	Put out afternoon snack/dinner in Board room, break room and replenish water, coffee, etc. as needed. For other rooms, ensure trash is empty, areas picked up. <ul style="list-style-type: none"> Blackjack Pizza will be delivered at 5:10pm 	Alicia and Erica	Boardroom, kitchen, and breakroom
5:30-6:00	Update Goal Chart	Brooke or Kelly	
7:00 pm	Check on taxpayer sign in sheet to determine when we should cut off	Courtney or Sasha	
8:30 pm	Take picture of final taxpayer of the day or of remaining staff and volunteers.	Brooke	Hallway or conference room
8:30 pm – 9:00 pm	Final Clean up of MHUW. Store all materials not loaded in cars in Grant Thornton Conference Room	All	Volunteer Breakroom

Partners Attending Taxathon

Name	Time	Contact
Denver Scholarship Foundation	8:30am - 12:30pm	Kristin
Taxpayer Advocate Service at Taxathon	8:30am - 12:30pm	Eric
University of Denver Low Income Taxpayer Clinic	8:30am - 8:30pm	Erin
DHS	8:30am - 8:30pm	(Pamela) Leo and Lynn
RE: Vision	9am - 5 pm	Mayra and Matilde
Key Bank		
Mpowered (sm)	8:30am-4:30 pm	(Lydia) Brian and Rachel

Mile High United Way	8:30am - 8:30 pm	(Fermin) Yarem, Angelica, Elizabeth setting up night before
Center for Workforce Initiatives	8:00am - 5:00pm	Aaron Vieyra Suarez Richard Marr Rosella Palacios Voletha Bradley Jenna Tullberg Katrina Wert
CCD	8:30 - 12:00 pm	Andrew Garcia (andrew.garcia@ccd.edu)

Scheduled VIPs

Who	Notes
Eddie Koen, Chief Impact Officer @MHUW	8:30-10 am
Senator Williams	12pm-1pm
Mayor Hancock	1:50pm
Representative Leslie Herod	2pm -3pm