

PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

Table of Contents for Taxathon Resource Guide

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2. **2018 Plan Proposal:** Used with the planning committee who participated in the event.
3. **E-News Article to Volunteers:** Prepare + Prosper (P+P) volunteers receive regular communication through our bi-weekly “Volunteer Connect” newsletters. This was the main and most successful mode of communication used to recruit volunteers for the Taxathon.
4. **Taxathon Email to Stakeholders:** This email was sent out to donors and friends of the organization inviting them to participate in the Taxathon by stopping by, bringing food, and/or following the event on social media. This was sent to a broad audience and then also sent to targeted individuals.
5. **Media Advisory:** Sent mainly to TV stations, the media advisory was used to pitch stations to cover the event.
6. **Press Release:** Only used during the first year of the Taxathon, the press release was sent out after event as a way to garner additional coverage.
7. **Kick-Off Program:** The Taxathon was launched with a short program where P+P’s executive director, the commissioner of the Department of Revenue, and leadership from Greater Twin Cities United Way spoke. This document was sent to the speakers and their staff.
8. **Instructions for Full-Time Staff:** P+P full-time staff were asked to help at the Taxathon, so this document was shared during a presentation at

a staff meeting and used a reference point before and throughout the event guiding staff on how to help during the event.

9. **Talking Points for the Volunteer Huddle:** Before each volunteer shift at our tax clinics, we have a volunteer huddle where announcements are shared. These are the notes for the Taxathon's clinics. The talking points were read by the staff managing the tax site for that shift.
10. **Table Tents:** The tents were placed throughout the tax clinic informing customers how they could get involved in the Taxathon.

For questions or more information about P+P's Taxathon, please contact Andrea Kiepe at andrea@prepareandprosper.org or 651-262-2160.

Notes on some acronyms:

- TSS = Tax Site Specialist is the volunteer who is responsible for customer support and service for taxpayers, including check-in and check-out.
- IM = Intake Manager is the seasonal staff person who oversees the tax site specialist(s) at the site
- FM = Financial Manager is the seasonal staff who oversees the volunteer financial advocates who coordinate the financial services at the tax sites