Virtual Training Series

Organizing a Taxathon – Why & How to Do It

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The Piton Foundation

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Jessica Grote
The Cooperative Ministry

Center on Budget & Policy Priorities
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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
Our Presenters

Taylor Putz  Courtney O’Reilly  Jessica Grote
What is a Taxathon?

• A taxathon is an exciting and unique tax filing event
Why Hold a Taxathon?

• Jumpstart your outreach early in the tax season

• Attract new clients, especially those eligible for EITC

• Make tax filing more fun!
Organizing a Taxathon

- Taxathons are for free tax programs of all sizes
- Learn key elements for planning this type of celebratory event
  - Volunteers
  - Marketing
  - Media coverage
PREPARE + PROSPER

LARGE MODEL TAXATHON EXPERIENCE
INSIGHTS AND LESSONS LEARNED

Taylor Putz
Community Relations + Outreach Manager
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WHO WE ARE

Run and promote programs and policies that foster financial health and wealth

• Free tax preparation, financial services, and financial coaching (Money Mentors)
• Claim it! campaign
• FAIR initiative (wealth-building financial product with wide distribution and scalability)
• Policy change in areas of tax credits, asset building, and consumer protection
WHY WE HELD A TAXATHON

• Serve more EITC recipients
• Garner media coverage
• Engage volunteers
• Try new initiatives that embrace our brand

#taxathon
TAXATHON IN ONE WORD....

- Fun
- Successful
- Festive
- Energizing
- Exhausting
- Community

PREPARE + PROSPER
24 HOURS OF TAX PREP

Year One (2016)
- First weekend in February
- Appointments only
- Held at our main tax site

- **Friday** 9 a.m. – 9 p.m.
  - Normally do not do taxes on Fridays
  - Three shifts

- **Saturday** 9 a.m. until 9 p.m. (new)
  - Normally open 9 a.m. – 5 p.m. so we added one shift
  - Three shifts total

Year Two (2017)
- First weekend in February
- Appointments only
- Held at our main tax site again

- **Friday** 9 a.m. – 1 a.m.
  - Normally do not do taxes on Fridays
  - Four shifts

- **Saturday** 9 a.m. – 5 p.m.
  - Normally open 9 a.m. – 5 p.m. on Saturdays
  - No shifts were added
  - Two Shifts
TAXATHON BY THE NUMBERS

125 volunteers
Helped at the taxathon

200+ taxpayers
filed their taxes

Returned
$700,000
in tax refunds

PREPARE + PROSPER
TAXATHON PLANNING

• Led by the marketing + communications team at P+P
• Held 2-3 planning meetings from September – January and one follow up meeting
• Planning team consisted of staff from the tax, volunteer, development, and marketing teams
• Encouraged full-time staff to help during the taxathon
WHAT WE DID
KICK-OFF EVENT

- 10 minutes before the first shift
- Invited our partners
- Held a short program
- Did a group countdown!
- Used Facebook Live
RESULTS BOARD

- Updated after every shift
- Took pictures for social media
- Tracked while checking customers out

PREPARE + PROSPER
CONTESTS

- Every 25th customer received $5 and took a picture with a volunteer or staff
- Customers guessed how many candy bars were in a jar while waiting for their appointment
- Held a “tax quiz” contest for volunteers at every shift
SUPERHEROES

• The planning team wanted ways to make the Saturday “regular” shift extra fun

• Superheroes joined the taxathon for 1½ hours
FOOD AND COFFEE

- Partners stopped by and dropped off treats throughout the event
- There was popcorn for customers and volunteers
- Fair trade coffee throughout the event
MEDIA

- We had the biggest successes with TV stations showing up during the first day
- Launch of tax season coverage with a fun spin
PICTURE FRAMES

• Used the frames to engage customers, volunteers, and partners

• Great for social media
COLORING SHEETS FOR KIDS!

• Worked with a local designer to put together a coloring sheet for kids

• “Launched” the coloring sheet at the taxathon and used throughout the tax season

• Hung the coloring sheets on the wall throughout the event
“IT FELT LIKE A PARTY!”

- Purchased lots of balloons and other party favors
- Volunteers wore the same t-shirts
• Took a group picture at the end of the taxathon

• Involved staff, volunteers, and customers

• Great for social media!
LESSONS LEARNED

• Make room for walk-ins who hear about the taxathon on the news

• Improve the “tally sheet” process for tracking refunds etc.

• Buy more balloons, especially for kids who want to take them home

• Clearly communicate who the “go-to” person is for the event

• Intentionally plan extra activities for the normally scheduled shift
Thank you!
Denver’s First Taxathon: Medium Model Experience

Courtney O'Reilly, Program Manager - Tax Help Colorado
About The Piton Foundation & Tax Help Colorado

• The Piton Foundation: Improving the lives of Colorado’s low-income children and their families
• Tax Credits for Working Families Outreach Campaign begins in 1989
• Tax Help Colorado Program
  – Adapted from Tax Help New Mexico
  – Utilizing College and High School Students
Why a Taxathon?

- The Challenge with EITC Awareness Day
- Prepare + Prosper Inspired and Amazed
- Create Newsworthy Content with a Kick-Off Event
- Opportunity to Offer Additional Services
- Strengthen Relationships with Partnering Organizations
- Help More Families File Early!
Denver Taxathon Model

- 12 Hour Taxathon
- Denver Asset Building Coalition
- No Speaking Engagement

- Partner Engagement
- Resource Fair for Taxpayers
Denver Taxathon Model Continued

- Kids Table
- First come, first served
- All three tax models available

- Story Collection
- Volunteer Experience
Denver Taxathon 2017 Results

- 350 volunteer hours
- Filed nearly 100 returns, $189,000 in federal refunds
- 2 Elected Officials Visits
Denver Taxathon 2017 Results

• 9 Partnering Organizations
  – Colorado VITA Coalition

• Social media:
  – 178 Posts
  – 50 Users
  – 44K Reach
  – 163,409 Impressions

• Earned Media
  – Denver 7 News Interview
Lessons Learned and Advice for Beginners

• Changes for Denver Taxathon 2018
  – Kick-off planning date in September
  – Increase Taxathon promotion
  – Schedule appointments
  – Training for partner organizations
  – Better engagement at the site

• Advice for Others
  – Prioritize what is most important to you
  – Identify team roles early
  – Include other volunteers not currently associated with VITA
  – Reach out to other VITA Taxathon enthusiasts
SMALL MODEL TAXATHON EXPERIENCE

THE
COOPERATIVE MINISTRY

JESSICA GROTE
DIRECTOR OF FINANCIAL SUSTAINABILITY
18 VITA sites spread across 8 counties

165 Volunteers

Over 7600 Tax Returns in 2017
“SUPER SATURDAY”
WHY HOLD A FREE TAX FILING EVENT?

- Media Coverage
- Support New Volunteers
- February Rush
HOW TO HOLD A FREE TAX FILING EVENT, FOR FREE

Use your connections

- Location
- Volunteers
- Community Partner Booths
- Music and décor
- Food
LESSONS LEARNED & TOP TIPS

- Start interview station early
- Flow the traffic
- Identify a go-to advanced preparer
- Use relationships, don’t create them
- Save the date early
- Take photos
Contact Information

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Get Started Organizing Your Own Taxathon

Taxathon Planning Resources

Follow-up Taxathon Planning Session

Taxathon Planning Support Session

Date: Thursday, September 14, 2017

Time: 3:00 – 4:00 PM ET/ 2:00 – 3:00 CT

Purpose:
• Talk through your ideas with people who have hosted successful taxathons
• Get feedback on your draft materials
• Connect with others who commit to hold a taxathon in 2018

Email eitc Outreach@cbpp.org if you’re interested in joining the planning support session and weren’t able to attend the webinar.
Thank You for Joining!
Stay Connected

• Website: www.eitcoutreach.org

• Blog: www.eitcoutreach.org/blog

• Facebook: www.facebook.com/getitbackcampaign

• Tax Credit Outreach News: http://eepurl.com/bo6ra5

• Email: eitcoutreach@cbpp.org