



Organizing a Taxathon Training Q&A

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

Logistics

- *What did you do for computers and Wi-Fi?*

(Jessica) For our smaller event, only about 20 people prepared taxes. Half of the volunteers used a computer lab on site, and the other half brought their own laptops or used the laptops we brought from our main hub. We connected them to a Wi-Fi internet device because they did not have Wi-Fi in the building.

- *Were you worried about software glitches?*

(Jessica and Taylor) It's a risk, but turned out okay for our taxathons. If you are very concerned about this, you may want to consider holding your taxathon during non-peak hours.

- *What tips can you share for hosting multi-site taxathons?*

(Taylor) Make sure there's at least one "Taxathon Coordinator" at each site and clear communication throughout the planning process.

- *What do you do to stay secure? How did you do the quality review process?*

(Jessica) We had a separate waiting room/review room for the QR process which worked well. The client was there with reviewer and they printed the return when it was complete.

Clients

- *How many of the taxathon clients were new vs. returning?*

(Jessica) 23 percent of clients were new. 57 percent had been using services for 3 or more years.

- *Did people really show up over the 24-hour period? How many people came late at night and early morning?*

(Taylor) The latest we did taxes was 1 a.m. and the earliest was 9 a.m. We did not have a problem with people showing up. In fact, people loved that they could file their taxes at 9pm on a Friday night because it worked in their schedule!

Volunteers/ Staff

- *What tips can you share about getting volunteers to take the late shifts?*

(Taylor) We had to identify some volunteers to specifically ask to volunteer for the late shift (9 p.m. - 1 a.m.). They were the volunteers who LOVE doing taxes.

- *Do you have any other ideas for reaching out to volunteers?*

(Taylor) Prepare + Prosper sent out one email to its volunteers and that got most the shifts filled. Where there were gaps, we had to reach out to individuals and ask them volunteer at the taxathon. We were surprised at the little effort it took to get volunteers signed up for the taxathon!