

California/Nevada Community Action Partnership  
in conjunction with  
State of CA Community Services and Development

presents

EITC/VITA Webinar Series

# Webinar 3: VITA Program Marketing & Volunteer Management



California / Nevada Community  
Action Partnership



# Webinar Facilitator

Frank Ruiz

Assistant Director of Community Initiatives  
Community Services & Employment Training, Inc.

- \* Works for the Community Action Agency of Tulare County
- \* Established VITA Program in Tax Year 2005
- \* Operates 4 VITA sites in Tulare County
- \* Participates in the United Way of Fresno County EITC/VITA Coalition, Southern San Joaquin Valley Asset Building Coalition, and California EITC & Asset Building Coalition

# Purpose of EITC/VITA Webinar Series

- \* Encourage and equip community-based organizations to get involved in EITC Outreach and start VITA Sites
- \* Share best practices in EITC Outreach and VITA operations
- \* Provide resources to start new and grow existing VITA programs and coalitions

# Webinar Objectives

- \* Share best practices for EITC awareness and VITA outreach campaigns
- \* Share strategies for recruiting VITA volunteers
- \* Share best practices for volunteer training
- \* Share best practices for managing volunteers
- \* Share best practices for volunteer recognition

# Guest Presenters

- \* Program Marketing & Volunteer Training
  - \* Carmen Bernal, Vice President of Community Impact, United Way of Kern County
  - \* Vanessa Muniz, Regional Director, United Way of the Bay Area

# Alphabet Soup

- \* EITC: Earned Income Tax Credit, also abbreviated EIC
- \* VITA: Volunteer Income Tax Assistance Program
- \* TCE: Tax Counseling for the Elderly
- \* IRS SPEC: IRS division responsible for overseeing EITC and VITA coalitions
- \* Cal/Neva: California/Nevada Community Action Partnership
- \* ITIN: Individual Taxpayer Identification Number

# EITC/VITA Target Market

- \* Lower-income taxpayers (<\$50,000)
- \* Working families
- \* Taxpayers that qualify for EITC, Child Tax Credit, Child & Dependent Care Credit, and Education Credit
- \* Taxpayers that do not typically file tax returns

# Clients Need to Know

- \* Credits that they may qualify for
- \* Schedule and location of services
- \* Appointments and/or Walk-ins
- \* Required documents
- \* Tax information hotline (1-800-829-1040)

# Scale of Marketing Campaign

- \* **Smaller Sites:**

- \* Able to operate at capacity with existing client base

- \* **Larger Sites:**

- \* Must rely on community wide marketing campaign to ensure that sites are operating at capacity

# Key Ingredients of Marketing Campaigns

- \* Posters, Flyers, Envelope Inserts
- \* Hotline (Informational Script)
- \* Website
- \* Press Releases
- \* Media Events
- \* Talking Points for Interviews & Presentations
- \* Community Partners

# Community Partners

- \* 2-1-1 Hotline
- \* CalWORKs Programs
- \* One Stops
- \* Family Resource Centers
- \* Head Start Programs
- \* Affordable Housing Complexes
- \* Community Colleges
- \* Local Financial Institutions
- \* WIC offices
- \* First 5 Agencies
- \* State & Federal Government Officials
- \* Community Action Programs
- \* County Social Services Agencies
- \* Local School Districts
- \* Local Businesses

# Local Media Partners

- \* Press releases
- \* Public service announcements
- \* Talk shows (television & radio)
- \* Media events
- \* Ethnic media
- \* Paid advertisements

# EITC/VITA Branding

- \* Goal of branding is community awareness
- \* Educate people to file tax returns and claim credits
- \* VITA should be associated with Tax Returns
- \* Use consistently among all partners in a regional coalition

# Marketing Timeline

- \* **September:** Develop outreach and volunteer recruitment material
- \* **October-December:** Send out volunteer recruitment press release and flyers; volunteer presentations
- \* **December-January:** Launch EITC awareness campaign; launch save-the-date campaign encouraging taxpayers to wait until February to file free tax returns through VITA
- \* **January-April:** Promote VITA services

# Seasonality of Demand

- \* Most taxpayers in our target market file returns ASAP (January 15)
- \* Demand for VITA services is greatest the first month and last 2 weeks in April
- \* March is usually a slow period for VITA
  - \* Sites should develop strategies to increase demand in March to operate at capacity

# VITA Volunteers

- \* Greeters
- \* Intake Screeners
- \* Interpreters
- \* Tax Preparers
- \* Quality Reviewers
- \* Site Coordinators
- \* Outreach Ambassadors

# VITA Work Flow

1. Greeter: Signs-in & reviews requirements
2. Taxpayer: Completes IRS Interview & Intake Form and survey
3. Intake/Screenener: Reviews forms & required documentation
4. Tax Preparer: Completes the tax return
5. Quality Reviewer or Site Coordinator: Reviews tax return for accuracy & answers any questions
6. Site Coordinator: Electronically files all returns & addresses all rejected returns

# Volunteer Recruitment

- \* Target groups with large concentrations of potential volunteers
- \* Promote VITA as a high level/high impact volunteer opportunity
- \* Volunteers become a family
- \* Great resume builder
- \* Mini-internship for future finance professionals

# Volunteer Recruitment Strategies

- \* Presentations to service groups, schools, community meetings, etc.
- \* Collaborate with employment training programs
- \* Press releases
- \* Talk shows
- \* Contact previous volunteers
- \* Communicate need to clients

# Great Sources for Volunteers

- \* Americorps volunteers
- \* Retired professionals (RSVP)
- \* Social service workers
- \* Community college tax and accounting classes
- \* Services clubs
- \* High school leadership programs
- \* Local financial institutions
- \* Local churches
- \* Websites: [Volunteermatch.org](http://Volunteermatch.org), [Idealist.org](http://Idealist.org), [Craigslist](http://Craigslist.com), [Facebook](http://Facebook.com), [Hands On](http://HandsOn.org), etc.

# Volunteer Training

- \* Outlines expectations for all volunteers
- \* Shows volunteers how VITA work flow will operate
- \* Prepares volunteers to address the needs and concerns of taxpayers
- \* Trains tax preparers to accurately prepare returns
- \* Familiarizes tax preparers with TaxWise software
- \* Prepares tax preparers to pass volunteer certification exam
- \* Builds a sense of community among the volunteers and site coordinators

# Volunteer Training (continued)

- \* All volunteers regardless of position should be trained and submit Volunteer Agreement
- \* Programs should provide food for volunteers to show appreciation for commitment
- \* Combine trainings with other local programs
- \* Trainings should be convenient to volunteers and held at a time that they would normally volunteer
- \* Start of training with orientation and allow volunteers to weed themselves out if VITA is not a good fit

# Classroom Training

- \* Best for new and inexperienced volunteers
- \* Teaches both tax law and TaxWise software
- \* Gives practice preparing comprehensive tax returns
- \* Instructor must pass Intermediate Certification
- \* Must have access to computer lab for training
- \* Best done over 3-4 days
- \* Most programs train every Saturday in January
  - \* Some programs offer training in November and December

# Online Training

- \* Link & Learn Taxes <<http://www.irs.gov/app/vita/>>
- \* Only teaches tax law, but Practice Lab is available <<http://www.voltaxprep.com/>>
- \* Great for returners, experienced preparers, and site coordinators
- \* Best way to train preparers seeking intermediate and advanced certifications

# Volunteer Scheduling

- \* Ask volunteers to commit to a minimum days of service at the first day of training
- \* Starting on the second day of training, provide a schedule for volunteers to sign-up for dates to serve
- \* Ask volunteers to give an email and phone number so you can confirm availability to serve
- \* Keep sign-in sheets and log of volunteer hours

# Volunteer Communication

- \* Site coordinators should stay in constant communication with volunteers to provide:
  - \* Updates on Quality Site Requirements
  - \* Updates on common errors occurring at the site
  - \* Tips on how to handle various returns or clients
  - \* Status of VITA site performance
  - \* Gratitude for volunteer commitment and encouragement to continue serving

# Volunteer Appreciation

- \* To show appreciation for serving, VITA Program should provide volunteers with the following:
  - \* Food and refreshments during training and operations
  - \* Certificates of Appreciation
  - \* Awards for exceptional service
  - \* Year end banquet
  - \* Limited freedom to modify the program work flow
  - \* Opportunities to provide feedback to improve program

# Resources Available

- \* Program marketing flyer and envelope inserts
- \* Sample press releases
- \* Volunteer recruitment flyer and postcard
- \* Volunteer training agendas
- \* Volunteer training presentations
- \* Volunteer job descriptions and application

# Additional Resources

- \* Cal/Neva Earned Income Tax Credit Resource Guide

<http://www.cal-neva.org/programs/documents/EITCManualEd3Final.pdf>

- \* IRS VITA Website

<http://www.irs.gov/individuals/article/0,,id=107626,00.html>

- \* Earn It! Keep It! Save It! Website

<http://www.earnitkeepitsaveit.org/>

# Group Discussion Questions

# Upcoming Webinars & Events

- \* Webinar 4 : VITA Funding, Sustainability & Partnerships
  - \* Thursday, October 20, 2011 @ 10am
- \* California EITC & Asset Building Coalition Annual Symposium
  - \* Tuesday, November 15 @ Burbank Marriott
  - \* Register: [calneva.camp7.org](http://calneva.camp7.org)



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FULFILLING the PROMISE



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