

Chronology for Organizing an EITC Volunteer Program

August

Work with area volunteer center to develop recruitment ad
Review existing volunteer spreadsheet and add names of potential volunteers
Contact area college accounting departments; invite faculty to join coalition, recruit students

September

Send letter to volunteer list with preview of upcoming tax season and open house dates
Begin developing training schedule and course outlines

October

Send out media release announcing volunteer recruitment drive
Area volunteer center should start running ads
Send letter to area businesses to recruit professional volunteers
Determine if there's money in budget to feed volunteers during filings

November

Update spreadsheet with new recruit information; create email distribution list
Communicate w/volunteers re: tax training options; begin sign ups
Distribute textbooks as soon as they are received from IRS
Finalize training materials/course content/filing dates
If feeding volunteers, contact area restaurants for interest in providing volume discounts

December

Host volunteer open houses to explain the season, preview changes, hand out textbooks
Encourage volunteers to commit to filing dates now
Send out training date reminders
Set up resource library at site (if possible) for volunteer reference

January

Intense training period begins: tax law, state tax law, software training
Consider offering a Friends & Family Filing night for low-stress practical training
Compile signed IRS certifications; maintain at filing site
Last chance opportunity to recruit additional volunteers
Offer site procedures training for ALL volunteers
Confirm filing date sign-ups from December
Make nametags
Schedule restaurants now for each filing date; can call in actual number 24 hours in advance

Throughout Tax Season

Send out weekly reminders to scheduled volunteers
Issue "call for volunteers" when sign-ups are light
Maintain sign-in sheets at each filing, ask volunteers to enter hours worked
Pick up or have food delivered for each filing date; confirm count with restaurants

Post Tax Season

Provide all volunteer names to IRS rep for award certificates
Develop and distribute volunteer surveys
Send thank you letter with season statistics and invitation to celebration dinner
Plan dinner and any awards/recognition you will provide; collect RSVPs
Mail letters, awards to volunteers who can't attend celebration
Compile surveys, distribute results