

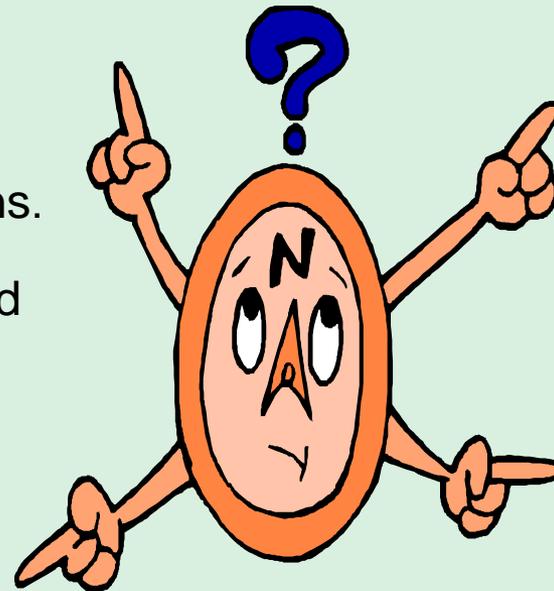
Port Gamble S'Klallam Tribe

VITA SITE



Why Have a VITA Site?

- Community Members Need
 - High prices for easy return preparation
 - Tax law confusing
 - Forms difficult to complete
 - Community members not filing returns.
 - Could not afford to have prepared
 - Owed Refund & did not know it
 - IRS Letters not being answered
 - Do not know what to do
 - Fear



Advantage of Tribal Site vs. Outside Site

- Better Awareness of Tribal tax issues
- Community more comfortable
- Increased Collection of Child Support
- Reduction in incorrect claiming of Dependents
- Better understanding of volunteer needs



How we Started

■ Department Director

- Appointed Site Coordinator
- IT Department
 - Computers

■ Site Coordinator

- Contacted IRS
- Found available site
- Advertised for Volunteers
 - Found need to recruit

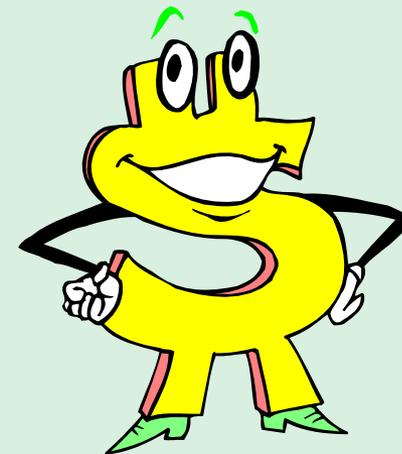


Results

- Prepared 163 Tax Returns
- 61% Native Americans + 11% Elderly
- 73% for families with AGI < \$40,000
- Over \$322,000 in refunds
- Estimated savings of \$33,200 in tax return preparation fees

Story behind Results

- Recent Divorcee with two children
- Friend brought her in
 - Client need assurances
 - We would not turn her into IRS
 - We would not make her feel stupid
- Tax Return
 - Minimum wage job for ½ year
 - Child Care Credit
 - Child Dependent Credit
 - Earned Income Credit
- Results
 - Tax Refund
 - She could buy food for her children
 - Pay rent
 - Fix her car



Getting Ready for a Site

- Contact IRS – September or October
 - Site Information Sheet
 - Where the Site is going to be
 - Days & Hours of Operation
 - Contact Person
 - Civil Rights Compliance Statement
 - Order your software
- IRS Order Form – October or November
 - Training Packet
 - Resource Material
 - 1040 Instructions & Publication 17
 - Intake/Quality Review Sheets
 - Tax Envelopes



Getting Ready for a Site (continued)

■ Recruit Volunteers

- Volunteer at least one day a week
- Three volunteers on site at a time
 - Two preparers & one reviewer

■ Set up Training

- In-House Training - December
 - Utilized Link-N-Learn

■ Set up Site - January

- Table with computers
 - Resource Material Available
- Place for clients to wait



What is Required during Tax Season?

- Be Open when you say you are
- Advertise Site – December to April
 - Put brochures around
 - Tribal Offices
 - Food Banks
 - Libraries
- Follow up on all rejected e-file returns
- HAVE FUN!!!



Volunteer Recognition



What did it Cost?

- Site to prepare taxes
 - Find an available room = \$25.00-\$50.00 per day
- Computers
 - Purchased Three Computers = \$3,600
 - IRS Lease option available
- Printer (Multi Purpose)
 - Buy one = \$250.00
 - Might be able to borrow one = \$0.00
- Supplies
 - IRS Provided
 - Resource & Training Materials
 - Tax Return Envelopes
 - Advertising Posters
 - Tribal Provided = \$50.00-\$100.00
 - Paper, Pen, Staples
- Volunteers (Six People)
 - Appreciation Lunch = \$30.00
 - Recognition Gift = \$30.00
 - Travel Reimbursement = \$200.00
- Other
 - Advertising Brochures = \$25.00-\$50.00
 - Sign Boards, community events, financial fairs, etc.



Why Successful?

■ Volunteers

- Desire to Help Other
- Understand Importance of Confidentiality
- Commit Necessary Time

■ Quality Training

- Link N Learn – IRS Web site
- In House Training a must

■ Support

- IRS Hot Line
- Site Coordinator



Questions



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