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Prosperity
Campaign

An Initiative of The Atlanta Community Food Bank

Creating New Ways To Recruit Volunteers and To Market VITA Sites— *Tips to Effectively Market to Both of Your Clients*

GA State EITC & Asset Building Conference
Savannah, GA
Tuesday, June 29, 2010



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Volunteer Income Tax Assistance (VITA) Program

- Coordinate VITA program in 10-county metro Atlanta—38 permanent and 3 mobile sites. VITA becomes the **portal** to help connect low-to-moderate income families with economic supports and financial services.

Benefits Outreach Program

- Screen and assist clients obtain economic supports (public benefits), including food stamps, Medicaid, PeachCare, energy assistance, etc.

Atlanta-area EITC Coalition

- Forum for members to learn more about each other and collaborate on issues affecting EITC eligible clients.



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Volunteer = Client

In order to ensure a rewarding volunteer experience:

- Be aware of volunteers' schedules and market to them accordingly i.e. college students
- Make it easy to **sign-up** and find info on your program
- Be organized and on-time
- Manage and present realistic expectations
- Be able to answer "Why should I volunteer for your program?" in 2 minutes or less.
- Fully assess and utilize volunteers skills and knowledgebase
- Be accessible-Check-in with volunteers, answer ?'s
- Recognize your volunteers often
- Allow volunteers to provide meaningful feedback on their experience and program



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What We Do-Volunteer Recruiting

- Recruit volunteers in fall/winter
- Allow volunteers to register online using www.apc.volunteerhub.com
- Provide volunteer info on website year-round and flyers during recruiting
- Advertise for volunteers in newsletters, website, local publications, and volunteer websites and service programs
- Offer various training sessions
- Volunteer recognition event
- Trained about 600 volunteers—400 actually volunteered in tax season 2010



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If You Build It-They Will Come

- **Be creative—There is no box!**
- **Preparation is best defense for fear**
- **Make a budget and strategic plan**
- **Word of mouth—Free and most effective**
- **Never be afraid to ask for what you need**
- **Keep it simple**
- **Knowledge is free—speak with other programs**
- **Know what works in your community**
- **Cross advertise with your other programs**
- **Collaborate with those who serve your target client base**



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What We Do-Marketing

- Provide sites with marketing tool kits in late fall/early winter including custom flyers, press release templates, outdoor banners and posters
- Utilize coalition members for marketing ideas and feedback as well as advertising vehicle.
- Market program through our ACFB newsletter, 700 shopping agencies, and other ACFB programs
- Advertise on radio, TV and local print publications
- Built a program specific website
- Engage local government and businesses to market to clients and employees
- Provide United Ways 211 program with site



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For More Information

Please visit our website: www.atlantaprosperty.org

For volunteer info: www.atlantaprosperty.org/volunteer

For marketing info:

<http://www.atlantaprosperty.org/resources>

VITA Program:

Cicely Garrett

VITA Program Coordinator

Atlanta Prosperity Campaign

678-553-5982

cicely.garrett@acfb.org

Thank you!

"Use All Available Weapons"

- Presented by:
Richard (Dick) Cramer
GA State Coordinator
Tax-Aide Program
AARP Foundation



Planning "Weapons"

- Recruiting is part of operating plan.
 - Used to attain growth objectives or make up for attrition.
 - GA Tax-Aide has grown from 650 to 857 volunteers in last 4 years.
 - GA Tax-Aide experiences ~15% attrition annually..
 - Do you have jobs for all prospective volunteers?
 - Are there equipment, site, material needs for new volunteers?
Who's going to manage new volunteers?



Publicity "Weapons"

- 1-888-687-2277
- www.aarp.org/taxaide.
- Word-of-mouth by current volunteers using Tell-a-friend cards.
- Program description handouts.
- Posters/flyers.
- TV/Radio public service messages.
- Direct mail postcards
 - 25K mailed to GA AARP members annually.
- Newspaper press releases & ad slicks.
 - Site & organization newsletters, web-site.
 - AARP Magazine and AARP Newsletter articles 2X/yr.
 - Get everywhere-we even use church bulletins, pennysavers.
- Assign publicity responsibility
 - GA Tax-Aide has Partnerships/Communications Specialist at state level.
 - Communication Coordinators at district level.

Management "Weapons"

- Maintain database of prospective volunteers, including their skills.
 - Tax-Aide has national database of all prospective volunteers.
- Keep in contact with prospective volunteers until they get started.
 - Tax-Aide has prospective Volunteer Coordinator on state mgmt. team.
 - Local/District Coordinator has orientation meetings with prospective volunteers before starting training.
- Follow up 6-12 mos. later with non-participating prospective volunteers.

A Taxing Proposition

Running a High School Tax Center

Michael Devault

Does your school have a community service requirement for graduates?

Are you looking for a way to connect tax education to the real world?

Is your school interested in giving back to your community through a community outreach effort?

Are your students struggling with much-needed life skills, such as filing their tax returns?

If you answered yes to any of the above questions, check out the IRS Volunteer Income Tax Assistance (VITA) program!

As a VITA host, you'll

- set up a site within your school
- train selected volunteer students/staff to do electronic filing
- process tax forms for the community and students

Level of Commitment

- Each school chooses its own level of commitment, depending upon
 - kinds of returns to process
 - level of training provided to volunteers
 - who the site will serve
 - site's days and hours of operation
- One adult volunteer is required to serve as site coordinator

How can VITA benefit my school?

- Satisfy students' community service requirements
- Enhance students' tax education by joining theory with experience
- Allow real-life applications of work
- Offer community services, extending value of school to community
- Provide teacher development opportunities
- Foster the development of "intangibles" — empathy, personal values

What do you have to do?



- Select a teacher/staff Volunteer Coordinator.
The right person is essential!
 - Eager
 - Energetic
 - Enthusiastic
 - No tax expertise required
 - No prior experience required

Volunteer Coordinator Responsibilities

- Recruit tax preparers
- Supervise/conduct training of volunteers
- Select location of site in school and gather all approvals
- Schedule/supervise all volunteers
- Answer questions/field problems

Estimated Time Commitment

- Amount of time depends on your level of commitment
- IRS VITA/e-file training of coordinator and volunteers in November and December
- Ongoing commitment from February through April



How will you select your volunteers?

- Select students from a variety of classes or groups:
 - Honors
 - Math
 - Accounting
 - Civics
 - Social Studies
 - Business
 - Entrepreneurial

What will volunteers do?



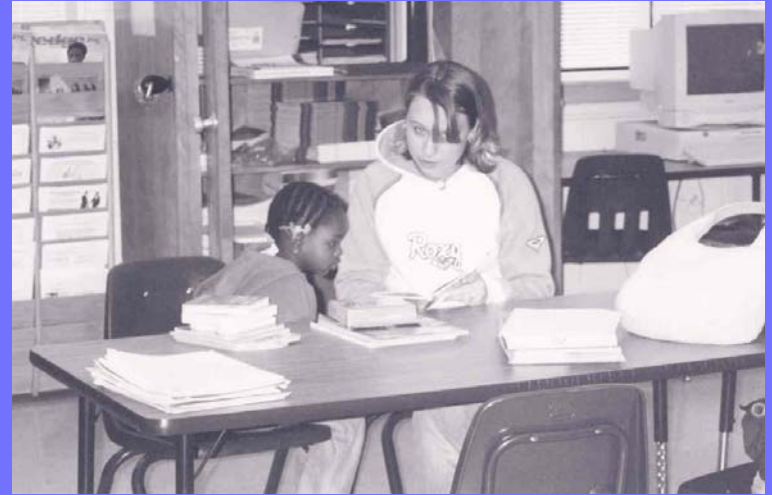
- Prepare selected tax forms (1040 EZ, 1040A, 1040 and related schedules)
- File returns electronically
- Answer questions
- Refer taxpayers to appropriate help

What volunteers will NOT do

- Prepare complicated returns
- Answer technical questions for which they have not been trained
- Accept pay or compensation from individuals or organizations for providing tax assistance or preparing tax returns


Additional help needed at site

- Screener
- Publicity
- Technical support



The school determines the schedule

- During school hours
- After school hours
- Weekends
- Super Saturdays
- During high-traffic periods—February and April



VITA
Volunteer Income Tax Assistance

TCE
The Community for the Elderly

Celebrating 30 Years of Community Service

VITA (Volunteer Income Tax Assistance) provides **FREE** tax help in the community.

Volunteers help people with basic tax returns, particularly those
With low and limited income, individuals with disabilities, non-English
Speaking and elderly taxpayers.

There is no charge for this service.

When _____

Where _____

For More Information _____

What to bring: This year's tax package and/or label - All forms, W-2 and 1099's - Information for other income - Information for all deductions/credits - A copy of last year's tax return.

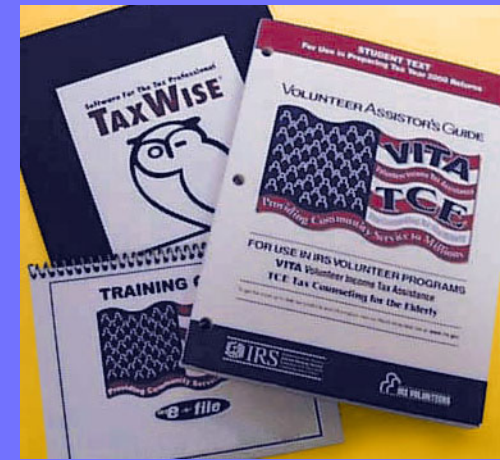
To get the most up to date tax products and information visit us on the world wide web at www.irs.gov

To whom will you make the service available?

- Students
- Qualifying Faculty/
Administrative Staff
- Community

What the IRS provided

- Self-paced training modules for preparers with IRS guidance and support as needed
- Step-by-step instructions for setting up your site
- Ongoing support from IRS Tax Specialists
- Web site: www.irs.gov

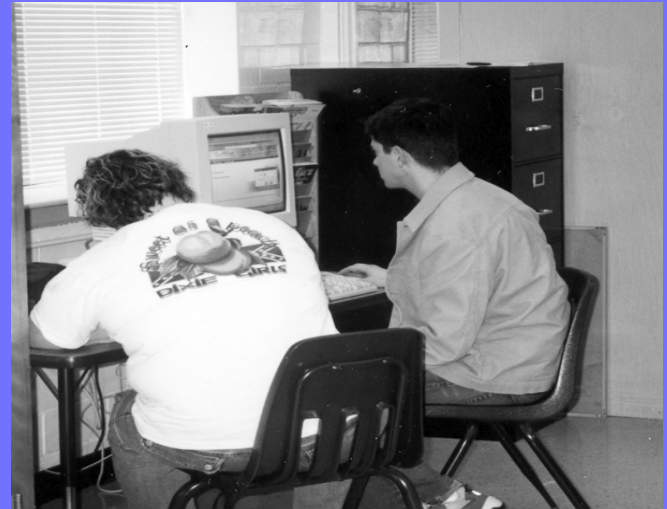


Our Implementation

- Training/Materials
- Student Responsibilities
- Student Evaluation
- Special Activities

Training

- Intensive Tax Law Review
- Tax Software Training
- Client Interaction –
Personal and Telephone



Materials

- Link and Learn web links and tutorials
- IRS provided student texts
- Tax Wise filing software

Student Responsibilities

- IRS Tax Assistor Exam
 - Must successfully complete to become Volunteer Tax Assistors
- Publicity
 - Notices and Flyers
 - Invitations
 - Visitations
- Spanish Interpretation
- Clerical Duties
- Childcare

Interdisciplinary Ideas

- Foreign Language
- Family and Consumer Science
 - Refreshments for Open House
 - Child Care for Clients
- Graphic Arts
- Mass Media

Open House



- School district issues a press release
- Community leaders are invited
- Graphics Arts Department creates special invitations
- Serves as a great way to kick off the tax preparation for the school and community
- Family/Consumer Science Department provides refreshments
- Gives faculty and staff a chance to see the tax center in action

Tax Center Statistics

2003-2010

	Yearly Average	Cumulative Totals
Total Returns	185	1482
Student Returns	38	305
Community Returns	147	693
Hispanic Clients	6	43
Refunds	\$178,000	\$1.2 million

The Next Step

- Determine who will be responsible for the VITA site in your school
- Get all start-up materials to Volunteer Coordinator ASAP
- The IRS is available to answer questions and offer support
- Contact the IRS at 1-800-829-1040 or your local coalition leader



Contact Information

Michael Devault

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Financial Services

Goodwill Success Center



History

- Provides FREE tax preparation to individuals
 - Promotion of federal tax credits specifically EITC & CTC
 - Trained & certified volunteers
 - E-filing
- 

History

- **Chattahoochee Valley VITA Coalition**
 - A collaborative of community nonprofit agencies, local businesses, and other civic and government groups
 - Coalition formed in 2004
 - Various sites in the community
- 2008, President & CEO joined

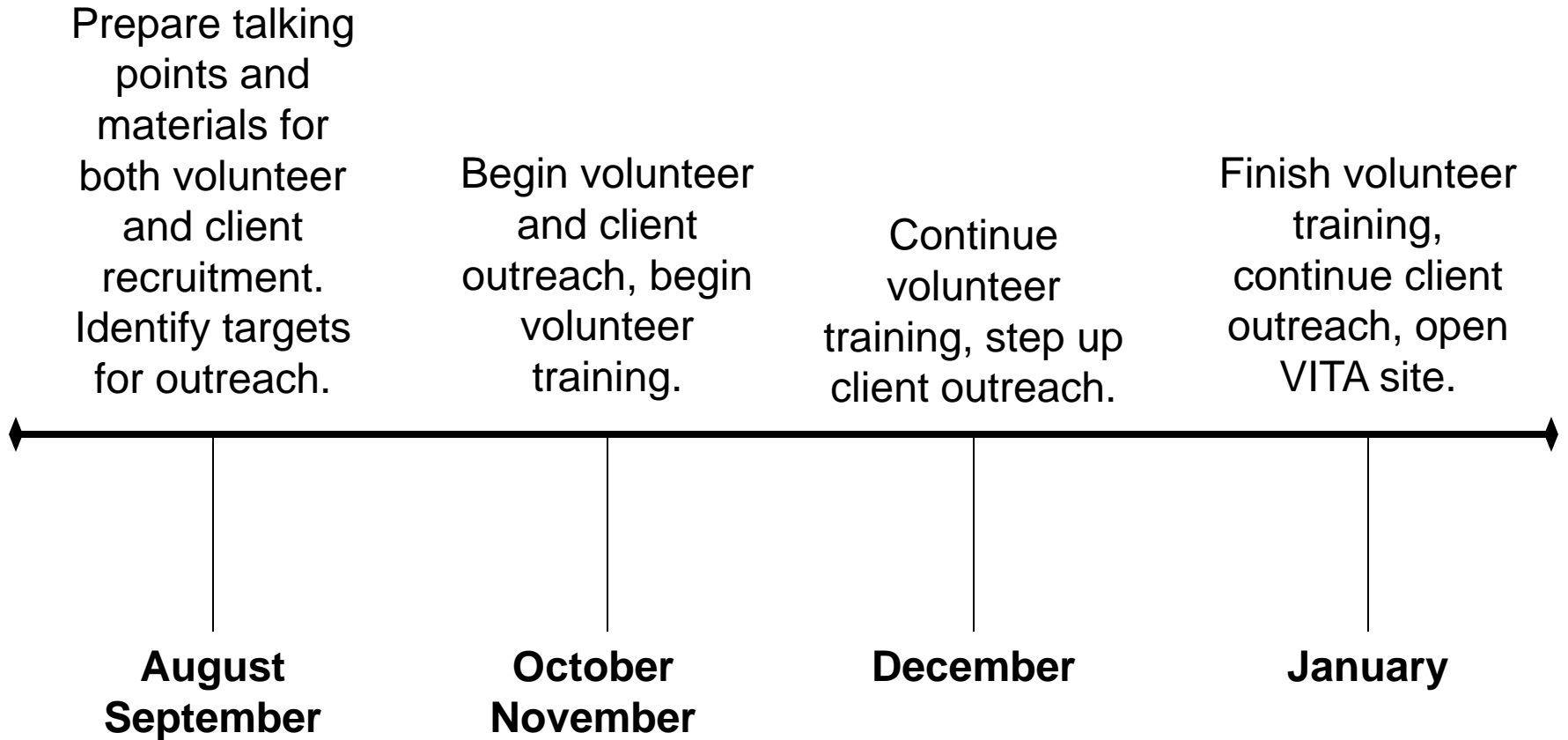


History

- September 2009, United Way of the Chattahoochee Valley approached Goodwill
- Fit in with our strategic plan
- Applied for Grant
- January 15, 2010 opened site – large public site for community



Timeline



Volunteer Outreach

- Materials
 - VITA Presentation
 - Employer letter
 - Volunteer card



Volunteer Outreach

■ Methods for Distribution

- Physically
- Electronically

■ Examples

- Poster Boards – Coffee Shops, Colleges Etc.
- Employer Intranets – Aflac, Total Systems, Columbus Bank & Trust, Synovus
- Email to our Contacts
- United Way
- Radio Stations – Live Morning Interviews, PSA's
- Columbus State University Partnership
- Chamber of Commerce BOD Meeting



Client Outreach

- Client Outreach Materials
 - Client preview flyer - November
 - Client information flyer - December
 - Public transportation signage
 - Banner's and Yard Signs



Client Outreach

- Methods for Distribution
 - Physically
 - Electronically
- Distributed To
 - State Agencies
 - Non Profits
 - Employers



Client Outreach

■ Examples:

- Housing Authority – Opportunity Fair, Meetings
- Health Department
- United Way Partner Agencies, Other Non Profits
- City of Columbus – Payroll Stuffers, Buses
- Chamber
- Public Library
- Civic Meetings
- Employers – Payroll Stuffers, Intranet, Meetings, Flyer Distribution



Use of Media

- Throughout Tax Season
- Focus on Volunteers Initially then Clients
 - Clear Channel Radio – PSA's, Interviews
 - PMB Broadcasting – Interviews
 - WTVM – Stories, PSA's
 - WLTZ – Interviews, Stories, PSA's
 - CCG-TV – PSA
 - Ledger Enquirer - Stories



What Worked?

- Friend or Family Member told You: **34 %**
- Picked up flyer at some location: **17.9 %**
- Used a VITA site last year: **16.2 %**
- Received flyer from employer: **14.5 %**
- Heard on radio or saw on TV: **8.4 %**
- Saw signs in this building or in area: **7.7 %**
- Not sure: **1.3 %**



Volunteer Training

Volunteers Trained & Certified	113
Number of Training Sessions	18



Volunteers

Volunteers	69
Total Volunteer Hours	1,448



Tax Season

Days Open	65
Hours Open	442



Results

Report Date	January 15 – May 7
Total Tax Returns Processed	1,242
Average Adjusted Gross Income	\$ 17,881.38
Total Earned Income Tax Credit	\$ 745,890
Total Child Tax Credit	\$ 278,720
Total Refund Dollars	\$ 1,886,542



Promotion & Outreach Costs

Food for Volunteer Training	\$1,462
Volunteer Cards (2,500)	\$311
Client Preview Flyers (5,000)	\$846
Client Flyers (60,000)	\$2,145
Banners & Directional Signage	\$756
TOTAL	\$5,520



Financial Services

- VITA, first step
- 5 Additional Focus Areas
 - Creating a Budget, Managing Expenses
 - Buying a Home
 - Understanding / Building Credit
 - Basics of Banking & Credit Cards
 - Paying for College



Goodwill Success Center

- FREE Career and Financial Services
- At Goodwill, we're committed to more than just helping people find a job. We're committed to helping individuals achieve financial stability and success. This new center offers state of the art technology, a bilingual staff, educational workshops and free tax preparation, allowing individuals to develop the skill and access the resources they need to achieve their dreams!

