



Tax Help Montana & Coalition Building

Presented by:

Karen Heisler & Tom Jacobson



**RURAL
DYNAMICS
INCORPORATED**

CONSUMER CREDIT COUNSELING SERVICE

www.RuralDynamics.org

1.877.275.2227

Rural Dynamics Incorporated Consumer Credit Counseling Service

We provide programs and develop partnerships to help youth, individuals, and families achieve economic independence.

Private, non-profit, founded in 1968
The only accredited agency in Montana
Member of the National Foundation for Credit Counseling



NATIONAL FOUNDATION FOR
CREDIT COUNSELING

Financial Literacy by People Who Care



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How did we get involved in free tax preparation?

- Switched our focus from promoting financial responsibility to promoting economic independence
- Joined in partnership with the IRS
- Leveraged partnerships with other community organizations



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- Earn It, Keep It, Grow It initiatives assist families and individuals as they move towards economic security
- Utilize a four-tiered approach to reach this end:
 - education courses
 - counseling sessions
 - asset development tools
 - policy initiatives
- Building partnerships and coalitions to expand regional capacity



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Starts with dialogue

- Generative dialogue
 - Plains Talk I and II
 - Subsequent Roundtables and Meetings to Establish a Coalition
 - Shared Framework for Shared Success



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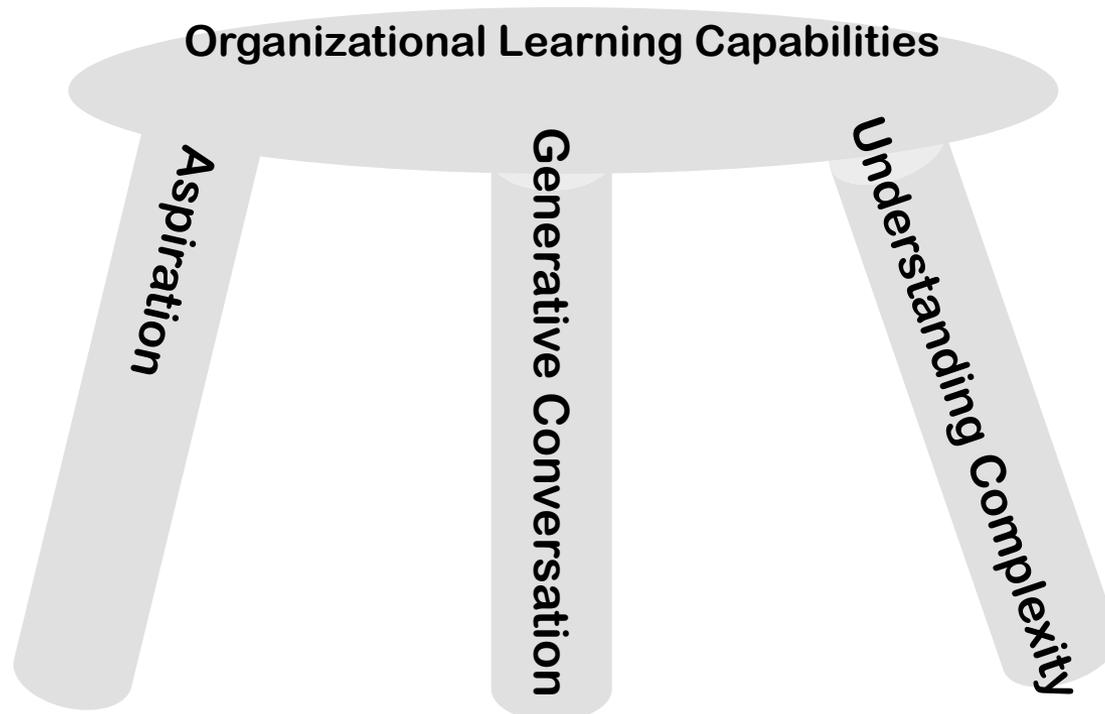
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Three-Legged Stool

Desired Future Reality



.Personal Mastery
.Shared Vision

.Mental Models
.Team Learning

.Systems Thinking

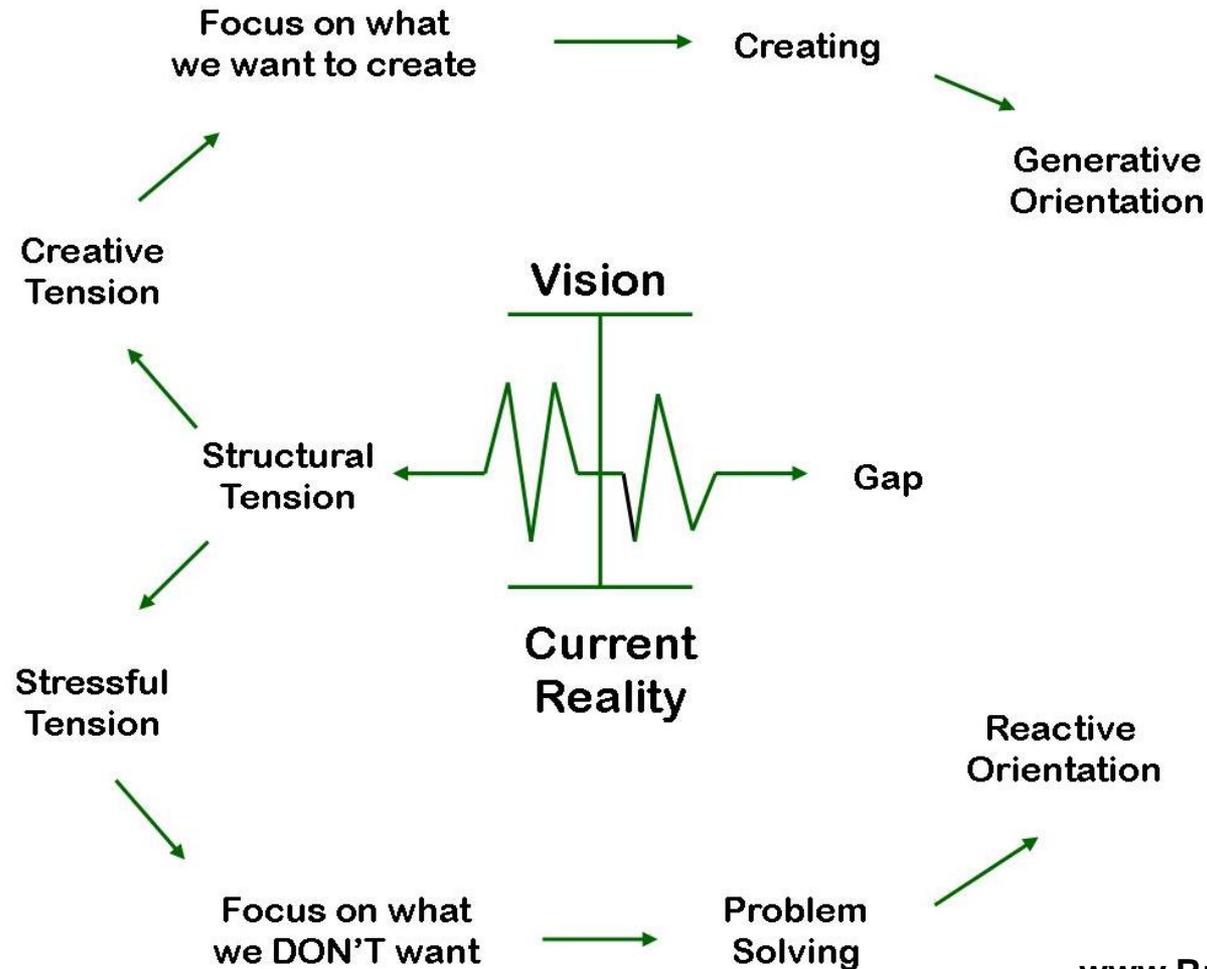


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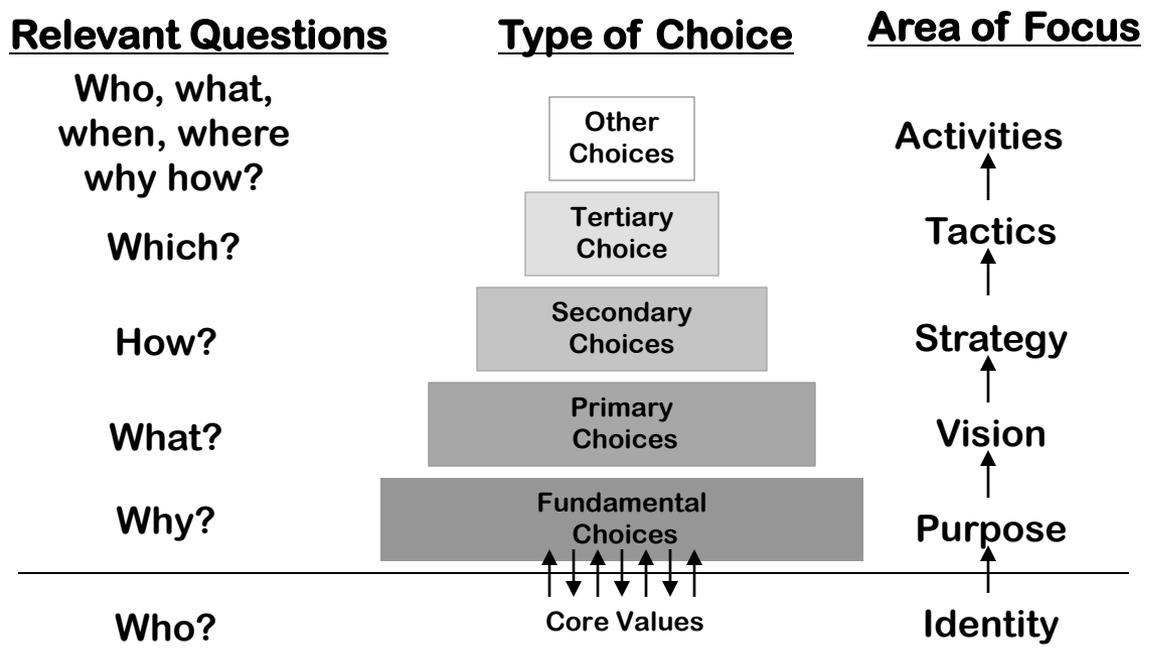
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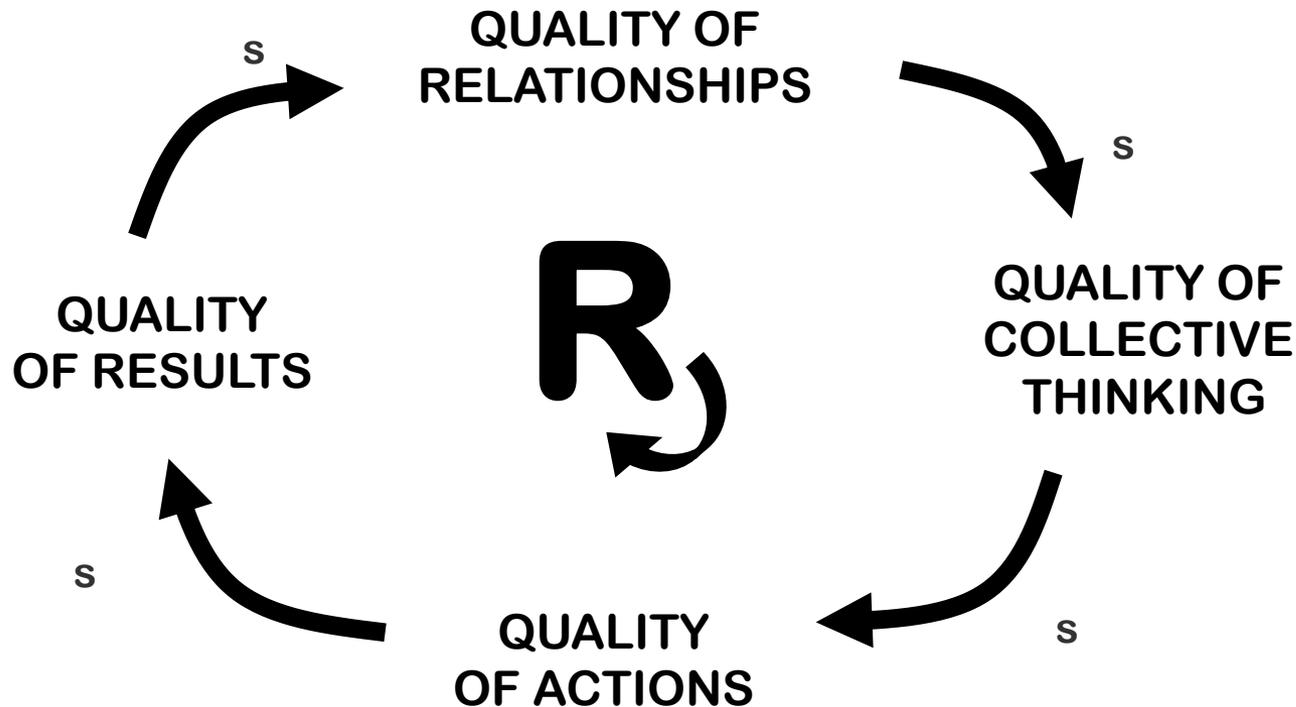
Creative Tension Model



Hierarchy of Choices



Core Theory of Success



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Great Partners = Success

- Montana Credit Unions for Community Development
- Montana Legal Services Association
- Americorps VISTAs
- Universities, State and Private Colleges, Tribal Colleges
- IRS
- National Community Tax Coalition
- Community Organizations – United Way, Faith Based, Community Development Corporations, CAP Agencies, public libraries, senior centers, local governments



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2009 Tax Season

- Prepared over 6,000 federal returns
- Returned over \$7M in federal refunds
- Over 60 tax sites across the state
- Used tax clinic model
- Used alternative filing model
- Partnered with organizations serving disabled populations



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Challenges in Rural Programming

- Long Distances
- Training
- Internet Quality & Availability
- Stigma or Belief About Filing
- Funding New Sites



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Strengths of Rural Programming

- Community Participation
- Rural Sustainability
- Knowledge Base
- Strong Partnerships



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Definition of Rural

A *designated Rural Area* is defined as a non-metropolitan county. A metropolitan county must contain at least one core urban area with a population of 50,000 or more. These rural areas will be targeted by zip codes. Map Point will be used to identify the targeted rural zip codes.

Traditional VITA/TCE Sites

In **traditional VITA/TCE sites**, a certified volunteer is required to conduct **face-to-face interviews** with taxpayers as their returns are prepared, quality reviewed and e-filed. This is the optimum method of volunteer tax preparation.

Alternative Tax Preparation Model for Rural Areas

Due to the sparseness of population in remote areas, recruiting and certifying volunteers to participate in rural VITA/TCE programs and obtaining computers to e-file are difficult challenges to overcome. The lack of a sufficient number of certified volunteers and equipment to prepare returns makes it unreasonable to expect volunteers to conduct face-to-face interviews with each taxpayer that visits the site, thus negatively impacting quality and the number of taxpayers that can be served.



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ALTERNATIVE FILING METHODS

NON-FACE-TO-FACE VOLUNTEER SITE

Non Face-to-Face Rural VITA/TCE Sites for assisting low income taxpayers in designated rural areas.

• In cases where taxpayers and partners are located in remote rural areas and the use of a traditional VITA/TCE site is not practical due to a lack of certified volunteers: equipment, internet access, etc., SPEC partners may use an alternative tax preparation model. SPEC has developed a model that advocates two organizations/sites partnering to provide VITA/TCE services through the incorporation of two components, the **intake site** and **non face-to-face preparation site**:

The intake site will include a volunteer:

- Explaining the process.
- Verifying taxpayer's proof of identification.
- Verifying taxpayer's and dependent's social security cards.
- Distributing intake and interview sheets.
- Obtaining a signed notice from the taxpayer explaining the process.
- Mailing, e-mailing, faxing or scanning the necessary taxpayer documents to the preparation site to have the return prepared.

The preparation site will include a certified volunteer:

- Calling the taxpayer and conducting the interview.
- Completing the tax return, and sending it to the taxpayer for review.
- Calling the taxpayer to conduct the quality review (preferably another IRS- certified volunteer).
- Mailing the completed return and Form 8879 for the taxpayer to sign.
- Securing the signed Form 8879 from the taxpayer
- Retaining the signed Form 8879 or sending it to the local territory office to be retained for three years.



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NON-FACE-TO-FACE VOLUNTEER SITE

SPEC proposes a model that advocates two organizations/sites partnering to provide VITA/TCE services through the incorporation of two components: the **Intake site** and **Non-face-to-face Preparation Site**:



The **Intake Site** will be located in a designated rural area. Any volunteer, IRS-certified or -uncertified, will review the taxpayer's proof of identity and source documents, and initiate the intake process by providing the taxpayer with an *approved Intake and Interview Sheet* to complete.

An ***uncertified volunteer*** can not provide any tax advice to the taxpayer and should advise the taxpayer to discuss any concerns with the IRS-certified volunteer.

The rural site may fax, e-mail, scan or mail copies of the taxpayers' documents necessary for preparation of the return from the intake site to the non-face to face preparation site. No tax returns will be prepared at the Intake site.



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NON-FACE-TO-FACE VOLUNTEER SITE

The **Non-face-to-face Preparation Site** will be located in a more populated or centralized area.

IRS-certified volunteers will review the taxpayers' faxed, e-mailed, scanned or mailed personal information to prepare the tax return. This certified volunteer will call the taxpayer and conduct the interview while verifying the information included on the intake sheet. The certified volunteer may or may not keep the taxpayer on the phone while the return is prepared. However, they will complete the return based on the received information and the taxpayer's interview.

Once the certified volunteer completes the return, it must be mailed, e-mailed, scanned or faxed to the taxpayer for their review.

Once the taxpayer has reviewed the return, a certified volunteer must talk to the taxpayer to conduct the Quality Review of the prepared return and secure required signatures.

The taxpayer or the intake site will mail the signed Forms 8879 with the required attachments (W-2s, etc.) to the tax preparation site for e-file transmission.

If there are IRS-certified volunteers at the intake site, the interview and quality review process may be conducted at the intake site, preferably face to face with taxpayer. In these cases, the return is prepared by the non-face-to-face preparation site in order to have the return e-filed.

- Each intake site should have a unique SIDN.
- A preparation site will require a SIDN if traditional tax preparation is being conducted at the preparation site.
- All sites must conform to the software contract requirements. See Publication 3189 for more information.



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NON-FACE-TO-FACE VOLUNTEER SITE

Returns Prepared

Each return preparation site will serve taxpayers that meet the current VITA/TCE guidelines.

Quality Site Requirements

All sites will follow the quality site requirements as shown in the *Site Coordinator Handbook*, Publication 1084.

Security Provisions

Volunteers must adhere to privacy and security guidelines outlined in Publication 4299 - *Privacy and Confidentiality*. Transferring taxpayer's information from one location to another for return preparation will require a notice and signed consent that details the entire process. Transferring taxpayer information includes sending the taxpayer personal information via mailing, e-mailing, faxing or scanning. A notice is required for the following:

- Mailing, e-mailing, faxing or scanning taxpayer information from the intake site to the preparation site.
- Mailing, e-mailing, faxing or scanning taxpayer information from the preparation site to the taxpayer.
- Mailing, e-mailing, faxing or scanning the taxpayer's signature documents from the taxpayer to the preparation site to allow the return to be e-filed.

NOTE: A suggested notice was created for this purpose. Next slide.

If taxpayer information is also shared or used for any other purpose than preparing tax returns, notices of consent to use and disclosure (share) are required as described in Internal Revenue Code section 7216 and Publication 4299, *Privacy and Confidentiality*. **This will require two additional taxpayer signed notices.**



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ALTERNATIVE FILING METHODS

Process Approval

Alternative Rural VITA/TCE site procedures must be reviewed and approved by the assigned Territory Manager prior to beginning site operations to ensure the requirements are fully covered.

Measured Results

The results will be measured by the increased number of sites from STARS and the increased number of returns filed by the identified rural sites as shown on SIDN report.



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Tax Clinics

- Partner with local community organization
- They provide space and internet
- Partner on marketing
- They set appointments
- We provide computers and certified volunteers



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Goals of Tax Clinics

Goal is to clients to opportunities in their communities to build their assets

- Bridge to Benefits
- IDA Programs
- Financial Education
- Savings Programs – Savings Bonds



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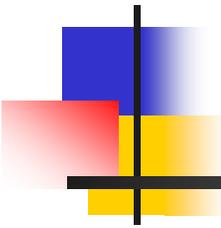


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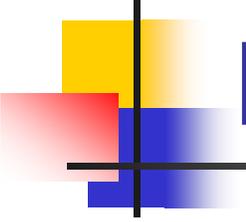
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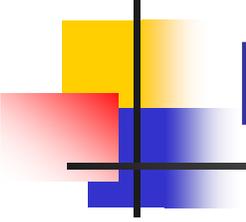
Georgia Legal Services
Program

Imaginknowlogy
(I-mā'-gən-nŏl'ə-jē) n.



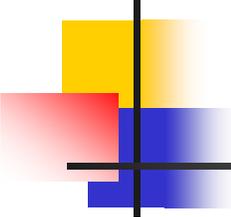
Georgia Legal Services Program

- Free or low-cost, currently available and "off-the-shelf" interactive technology approaches supportive of remote intake and outreach efforts
- Lab experiments
- Court-based program partnerships



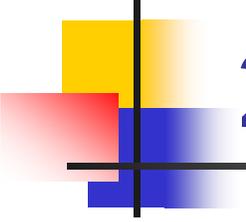
Georgia Legal Services Program

- Internet-based CMS
- Mobile law units
- Client and advocate podcast content
- LiveHelp real-time chat
- Remote access and support via webcam and communication software
- Virtual Offices and Meetings
- Online documents and document assembly
- Wikis for advocate support on the go



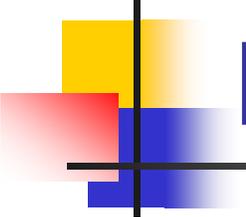
GLSP Technology Initiatives for 2009-10

- Pilot Projects with the Courts- Law Info Centers – Dougherty County; Appalachian Circuit, Chattahoochee Circuit
- GLSP Laptop Project (Lessons for Mobile Tax Law Units!)



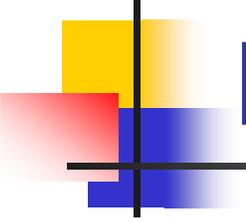
GLSP Technology Initiatives for 2009-10

- Microsoft Live Communications Server
- Podcasts for Client Legal Information and Staff Training and Updates



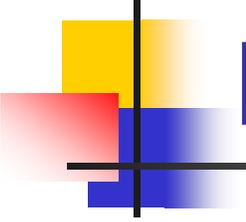
GEORGIA LEGAL SERVICES PROGRAM WEB AND TOOLS

- WWW.LEGALAID-GA.ORG
 - Self-help and information website
 - Built with special LSC funding
- WWW.GEORGIAADVOCATES.ORG/GLSP
 - Staff intranet
- WWW.GEORGIAADVOCATES.ORG/GOJC
 - GLSP Volunteer Support



Georgia Legal Services Program

- The GLSP Laptop Project (A “lab experiment”)
 - 5 advocates
 - Internet-based CMS
 - 5 laptops, aircards, docking stations, portable printers and scanners
 - Equipment training
 - Evaluation



Georgia Legal Services Program

- The Laptop Project
 - Usage and evaluation
 - Office-on-the-go
 - Remote intake
 - Court and Admin advocacy support
 - Tie-in to VOIP (laptop becomes phone and calls follow advocate)

Georgia Legal Services Program

- HotDocs– Document assembly for client self-help
- Client online interviews that produce completed documents
- Pleadings, letters, applications
- Outreach/intake support

The screenshot shows a web browser window titled "Automated Documents Online" for "NONPROFIT LEGAL SERVICES". The page is titled "Georgia Food Stamp Estimator" and is part of an "Interview Outline" with sections for "You and Your Household" and "Household Income".

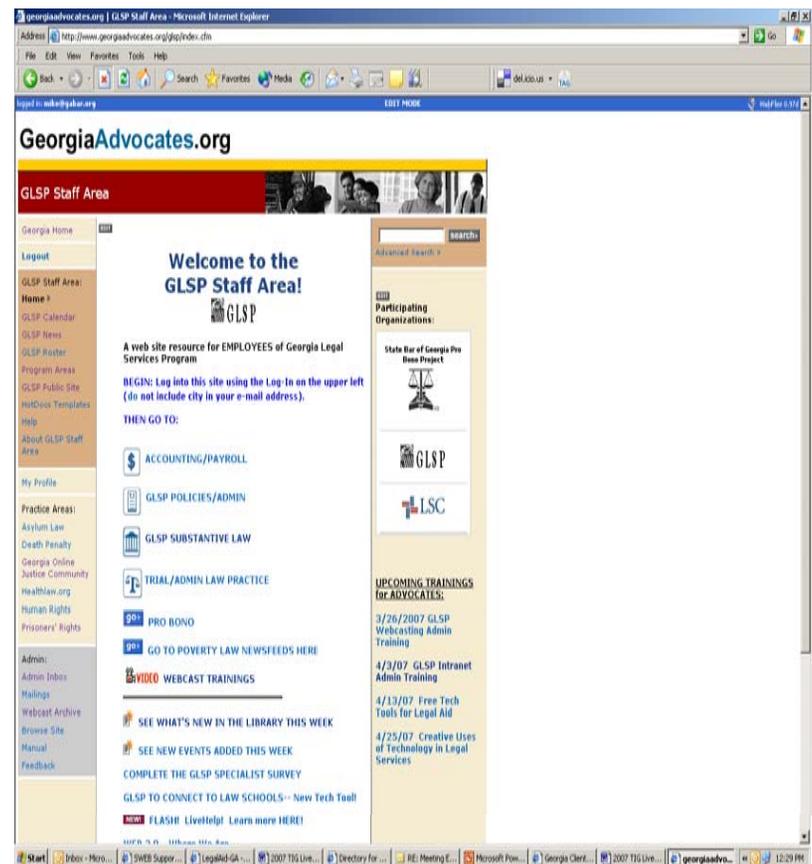
The "You and Your Household" section contains the following questions and input fields:

- "We need to know how many people live together with you and will receive food stamps together with you." with a "HOUSEHOLD SIZE" input field.
- "Are there any children in the household UNDER age 2? If yes, how many?" with an "UNDER AGE 2" input field.
- "Are there any other dependents in the household (either children OVER age 2 or adult dependents)? If yes, how many?" with an "OTHER DEPENDENTS" input field.
- "Does your household include anyone a SENIOR or DISABLED person who wants to receive food stamps together with the rest of the household?" with radio buttons for "Yes" and "No".
- "Does your household include a SENIOR or DISABLED person who wants to receive food stamps SEPARATELY from the rest of the household?" with radio buttons for "Yes" and "No".

At the bottom of the form, there is a navigation bar with "First", "Previous", "Next", and "Last" buttons, and a "Finish" button. Below the navigation bar, there is a definition of a household: "A household can be a person living alone, or a group of people living together (whether or not they are related) who purchase and prepare meals together. There can be more than one food stamp household living under the same roof. Some post-secondary students and some non-citizens -- as well as people who are 'disqualified' from getting food stamps -- cannot be included in the food stamp household. Husbands and wives, and parents and children, 21 and under, must be in the same household even if they don't purchase and prepare meals together."

GEORGIAADVOCATES.ORG 2010

- Statewide Volunteer Support Website
- In 2009-10 ...
 - 250,000 Total Visits
 - 99,000 Library Downloads
 - 7,500 webcast training views



GEORGIAADVOCATES.ORG

2010

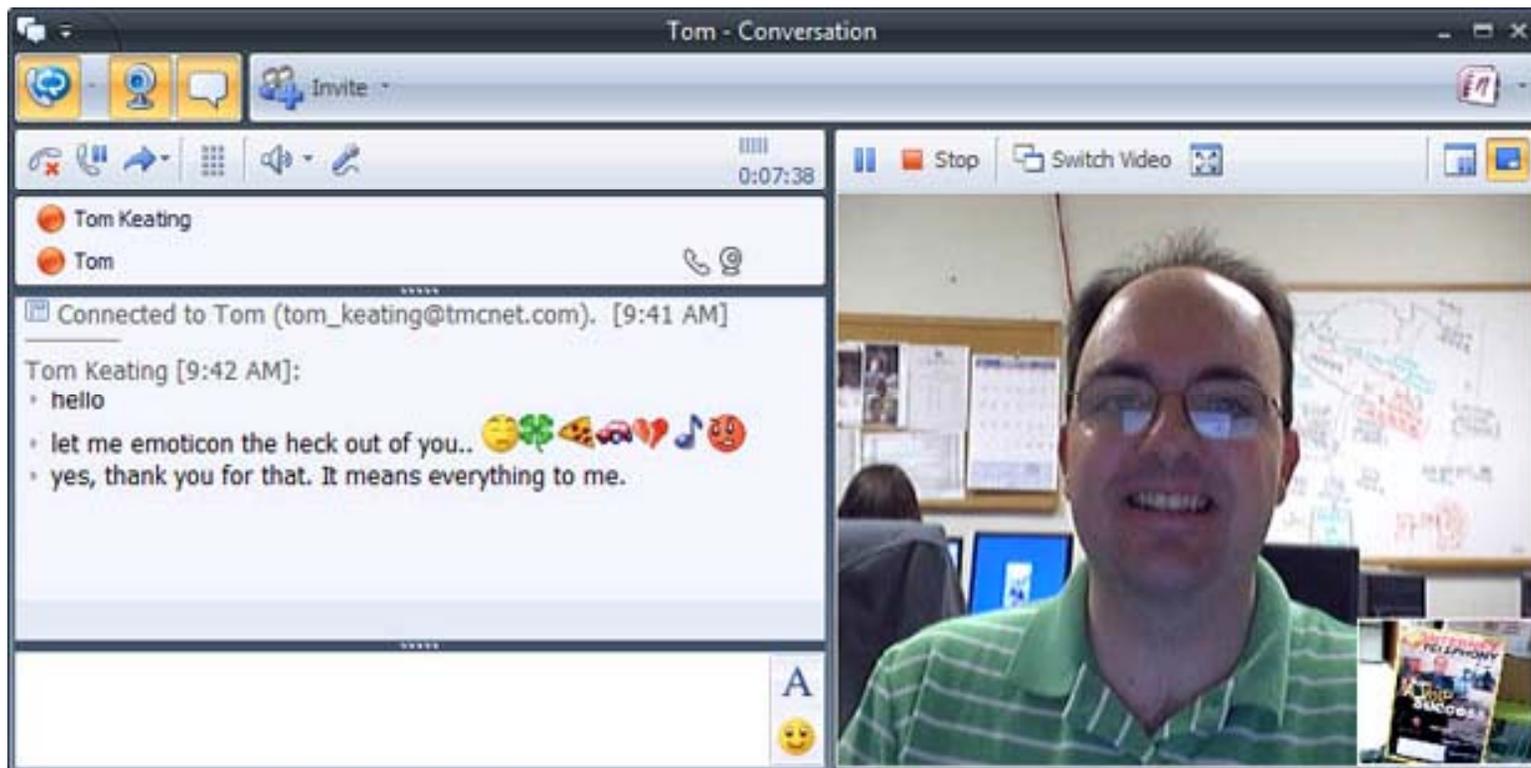
- **NEW FOR 2009-10**
 - **Case Management Integration– “XML”**
 - Integration of data and resources between statewide client and advocate websites and case management system
 - “One-Web” Approach
 - **Adds value to intake process**

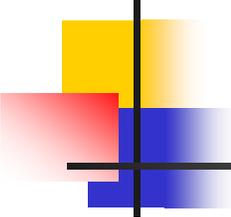
The screenshot displays the Georgia Legal Services Program web application. The main content area shows a list of documents for Case No. 06-0362596, including files like 'Citizen_Eligibility(1)-1-1.rtf' and 'Test2_Citizen_Eligibility.rtf'. Below this is a 'Recommended Documents' table with columns for Name, Type, Description, P.C., County, Lang, and Download. The table lists various legal documents such as 'AFFIDAVIT OF POVERTY', 'Motion', and 'Client Closing Letter'. On the right side, there is a 'Case Profile' section with details like 'Case No: 06-0362596', 'LPC: 32 Divorce / Sep. / Annul.', and 'Date Opened: 11/28/2006'. The bottom of the screen shows a Windows taskbar with several open applications.

Name	Type	Description	P.C.	County	Lang	Download
AFFIDAVIT OF POVERTY	Pleading	N/A	Y	N	N	Download
Affidavit of Poverty	Motion	N/A	Y	N	N	Download
Case Placement Confirm...	Judicare	N/A	Y	N	N	Download
Case Print Template	Misc	N/A	Y	N	Y	Download
Cit alien doc	N/A	N/A	Y	N	Y	Download
Client Closing Letter	Letter	N/A	Y	N	Y	Download
Client Closing Letter ...	Letter	N/A	Y	N	N	Download
Client Engagement Letter	Letter	N/A	Y	N	N	Download
No Show Letter	Letter	N/A	Y	N	N	Download
PAI 10-Day Closing Let...	Letter	N/A	Y	N	N	Download
PAI Case Placement and...	Letter	N/A	Y	N	Y	Download
PAI Case Status Update...	Misc	N/A	Y	N	N	Download
PAI Change in PaymentAg...	Judicare	N/A	Y	N	Y	Download
PAI Client Satisfaction...	Letter	N/A	Y	N	Y	Download
PAI Client Satisfactio...	Letter	N/A	Y	N	N	Download
PAI Estimate of Costs ...	Letter	N/A	Y	N	N	Download
PAI Fee Increase Appro...	Letter	N/A	Y	N	N	Download
PAI Judicare Case Stat...	Letter	N/A	Y	N	N	Download
PAI Judicare Client M...	Letter	N/A	Y	N	N	Download
PAI Judicare Final Rep...	Letter	N/A	Y	N	N	Download

GLSP Technology 2010

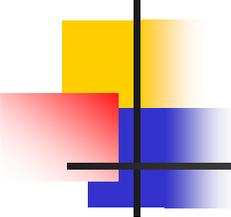
- Meet Online ...





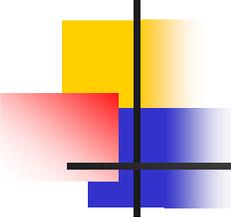
GLSP Technology 2010

- Microsoft Live Communications Server
 - Reduce travel for meetings
 - Enlist partner agencies to host a webcam for remote intake
 - Interview clients or prepare clients for hearing from remote site or another GLSP office.
 - Supervise telecommuters
 - Low cost strategy



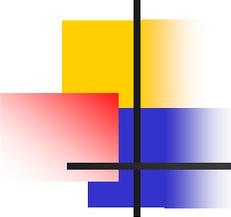
GLSP Technology 2010

- Podcasting
 - Court partnership- remote access to info
 - Open source software – “Audacity”
 - Cost of project – FREE!
 - Need a server to host the audio files?
 - Spoken brochures; “How –to”; record in other languages
 - MP3 Format – IPod anyone?



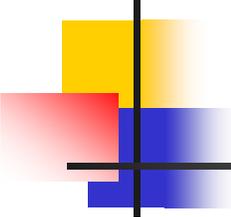
GLSP Technology 2010

- LIVEHELP --Live Chat and Co-Browsing
- Current Use:
 - Provides virtual, live assistance for web site visitors
 - Provides chat with Pro Bono Coordinators about website resources, calendar and volunteer opportunities
 - Points you to the resources you are looking for with live links
 - Chat discussions for pro bono practice and policy questions



GLSP Technology 2010

- LIVEHELP --Live Chat and Co-Browsing
- Potential Uses
 - Support for remote intake
 - LiveHelp Client on intake sites
 - LiveHelp on Client website
 - LiveHelp with Document Assembly
 - LiveHelp at Court-based centers to link to your program



GLSP Technology 2010

- Wikis
 - Create wikis for remote intake or outreach
 - Substantive law areas
 - Intake questions
 - Resources for clients and/or intake staff
 - Program policies
 - Create shortcut to wikis on laptop desktop
 - Real-time updates

Georgia Legal Services Program

- navigation
- Main Page
 - LSC Program Quality Visit
 - GLSP Management Procedures & Policy Manual
 - GLSP Private Attorney Involvement Manual
 - GLSP & Employees' Association of Georgia Legal Services NOLSW, Local 2320, UAW Collective Bargaining
 - test

search

Go Search

[article](#) [discussion](#) [view source](#) [history](#)

Main Page

Welcome to the Georgia Legal Services Program WIKI.

This WIKI is a GLSP site. GLSP internet usage policies and workplace policies apply to this site. GLSP reserves the right to approve or disapprove all registration requests and to ban/delete registered users at GLSP's discretion. Review GLSP's policy regarding internet usage.

Our GLSP WIKI includes:

- LSC Program Quality Visit
- GLSP Management Procedures & Policy Manual
- GLSP Private Attorney Involvement Manual
- GLSP & Employees' Association of Georgia Legal Services NOLSW, Local 2320, UAW Collective Bargaining Agreement (1/1/07- 6/30/10)

GLSP Substantive Law

[GLSP Food Stamp Fraud Advocacy](#) (This hosted wiki will soon be hosted in-house)

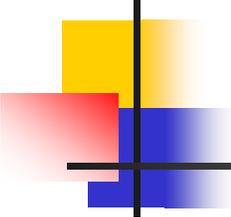
Check Out the [GLSP Media Server](#) Page -- Client Presentations, Podcasts, Advocacy Training Webinars, and More.

Consult the [User's Guide](#) for information on using the wiki software.

Getting started

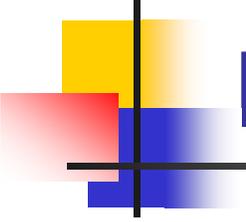
- [Configuration settings list](#)
- [MediaWiki FAQ](#)
- [MediaWiki release mailing list](#)





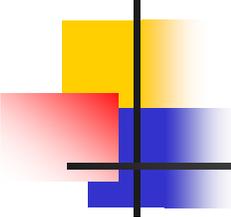
SOCIAL MEDIA

- EXPAND YOUR NETWORKS!
 - TWITTER
 - LINKED-IN
 - FACEBOOK



TECH POLICIES FOR YOR PROGRAM

- Legal compliance
- Implement policies on equipment and internet usage
- Train management & staff
- Find social media policies
 - [HTTP://LSNTAP.ORG](http://lsntap.org)

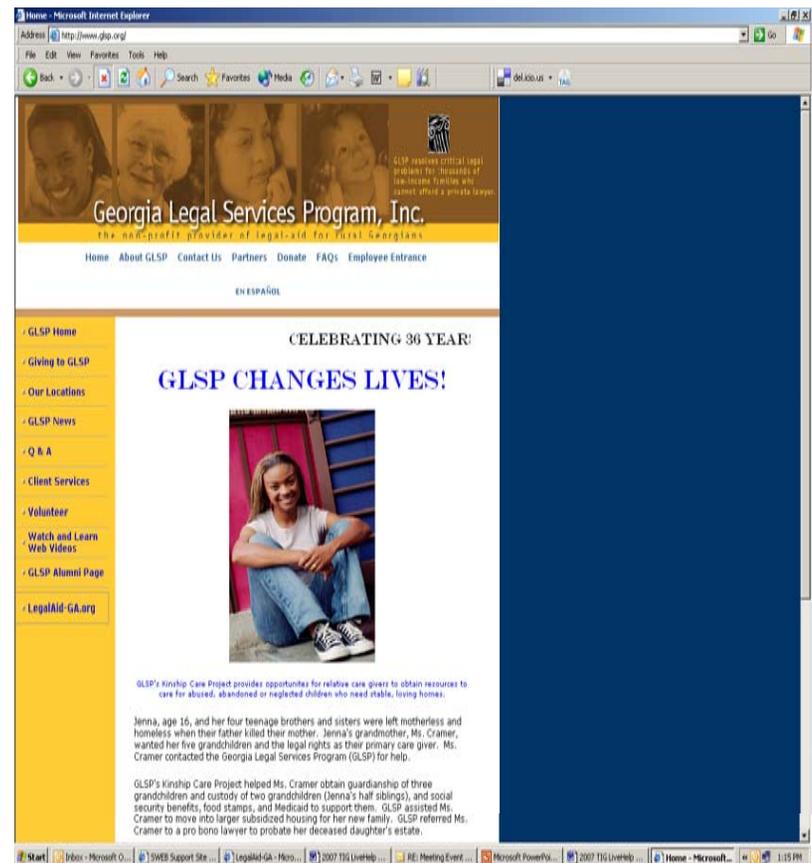


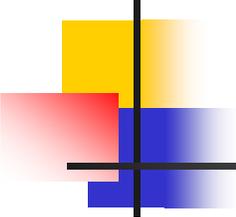
ONLINE RESOURCES

- www.gabar.org – State Bar of GA Tax Law Section
- [www.lsntap](http://www.lsntap.org) – Legal Services National Technology Assistance Project
- <http://techno.la> – Technology for the Legal Aid Community

GeorgiaAdvocates.org 2010

- OUR GOALS
 - Provide GLSP Staff & Volunteer Lawyers with up-to-date tech tools to increase efficiency
 - Assist in providing quality outcomes for clients and partners
 - Enhance awareness of the role of technology in legal services delivery





FIND US

- [HTTP://twitter.com/probono_ga](http://twitter.com/probono_ga)
- [HTTP://twitter.com/GeorgiaLegal](http://twitter.com/GeorgiaLegal)
- Facebook: Georgia Legal Services Program
 - Anticipate and explore new tech tools

STATE BAR OF GEORGIA PRO BONO PROJECT/GLSP

- JOIN US TO
IMAGINE, EXPLORE,
TEST AND
IMPLEMENT!
- CONTACT MIKE
MONAHAN,
MIKEM@GABAR.ORG





Rural Tax Initiative

Operating a Mobile Tax Assistance Program

Northeast Oklahoma Community Action Rural Tax Initiative

- Three Rural Counties in Oklahoma that border the states of Kansas, Missouri and Arkansas
- Provide tax services and outreach to 8 Head Start Centers and their communities
- Tax Site locations at DHS offices and Head Start Centers
- Financial Literacy outreach

Why should social service organizations perform this service?

- Other VITA sites do not target EITC/CTC
- Low-income wage earners are already our clients
- We can become experts on EITC/CTC & provide personal support to get the returns done
- We can provide other services: Individual Development Accounts and Financial Literacy
- We can facilitate the greatest savings and greatest financial return to these families

Why Focus on Head Start families?

- These are the clients eligible for the greatest returns with EITC/CTC
- They have a relationship with us and trust us
- The Head Start Centers are used as Tax Preparation sites and provide a “no-cost”, convenient location
- Family Service Workers assist and encourage the families
- Through parent meetings clients learn to avoid the high fees of tax preparation and refund anticipation loans

“Targeted Outreach”

- Targeted outreach focuses on identifying existing groups of individuals and families that could benefit from a service and taking that service to them. In the tax preparation assistance program, the most obvious group that could benefit from the EITC/CTC program for our agency was the Head Start family.

This Approach Provides

A convenient,
familiar site

Customers

Support and
follow-up for
families



NEOCAA Tax Timeline

July	Attend Head Start Staff training to promote activity
August	Send tax information out in parent welcome packets
October – November	Visit all Head Start Center Parent Meetings to promote tax preparation
December	Train the trainer with IRS Establish schedule Promote activities
January- April	Conduct tax preparation at all Head Start locations and DHS offices
April 15	Take a deep breath

How the Program Works

The regional site coordinator transmits all e-files from all sites.

Mobile site activity includes

1. Having a greeter to get application and determine that needed information has been collected
2. Securing intake form
3. Having tax preparers & quality reviewers
4. Having a site coordinator
5. Supplying financial literacy materials
6. Establishing a schedule for filers

First Year Activities

2001 Activities

- Agency staff were trained by the IRS SPEC office on-site
- Agency staff conducted tax preparation sessions in all 10 Head Start Centers and promoted the service in Parent Group Meetings and posters around town
- Additional returns were completed at agency's main office

2001 Results

- Assisted over 140 families
- Refunds to families exceeded \$240,000
- Average return was \$1,715

Program Expansion, 2002-2009

Trained additional staff and secured volunteers

Expanded the number of tax sites & sessions in each of the three counties

Added new local funding partners – United Way

Added new target groups – DHS clients, Lowe's, Grove Public Schools

Designated full-time coordinator for entire program

Provided banking services to unbankable clients

Added banners for promotion

2010 Filing Season

2010 Activities

- Added local site coordinators to assist program coordinator
- Expanded operations to include permanent locations in all three counties
- Returns completed at main office, DHS offices, and Head Start Centers

2010 Results

- Assisted over 1190 families
- Refunds to families exceeded \$1.9 million
- Average return was \$1,596

Program Expands to the State

The Oklahoma Association of Community Action Agencies and Oklahoma Department of Commerce worked with the Head Start Collaboration Office to expand the program to other Community Action Agencies' Head Start programs.

The program served 16,648 families, with total returns of \$23,409,012 and EITC of \$9,339,263 in the 2010 filing season.

What is the Cost and Benefit of the Program (NEOCAA)

The cost to operate the program for 2010 was \$28,121 in salaries, travel, and equipment

The return to clients was \$1,951,758

For every dollar invested in the program, there was a \$69 return to the client to enable greater self-sufficiency

Special Features

Provided information on tax laws to people who may not have filed return through us

Assisted parents to file a return to apply EITC to relieve a variety of tax debt from previous years

Assist families in clarifying who can claim dependents on returns

Assisted families in establishing bank accounts

Meet Laura

Single Head Start
Parent

2 Time filer Head
Start Vita Site

Year one – she cried at an over \$3000 refund
Informed her about Homebuyer Education
Program

Year two – used \$2000 for down payment on
home



Meet Connie

Head Start single mom of two

She has no bank but owns

a home and has kept \$3000

from Earned Income Credit

Connie uses some of the money each year to make home improvements to reduce energy bills and save for emergencies

She is volunteering to teach other Head Start families about how to save money.



Meet April

Divorced Head Start
parent of two children

The mother had not filed

for several years because she had been ill and had
not worked much

The mother was frightened to admit that she had
not filed previous returns

Previous returns were filed and she received
enough money to make a down payment on a
house.



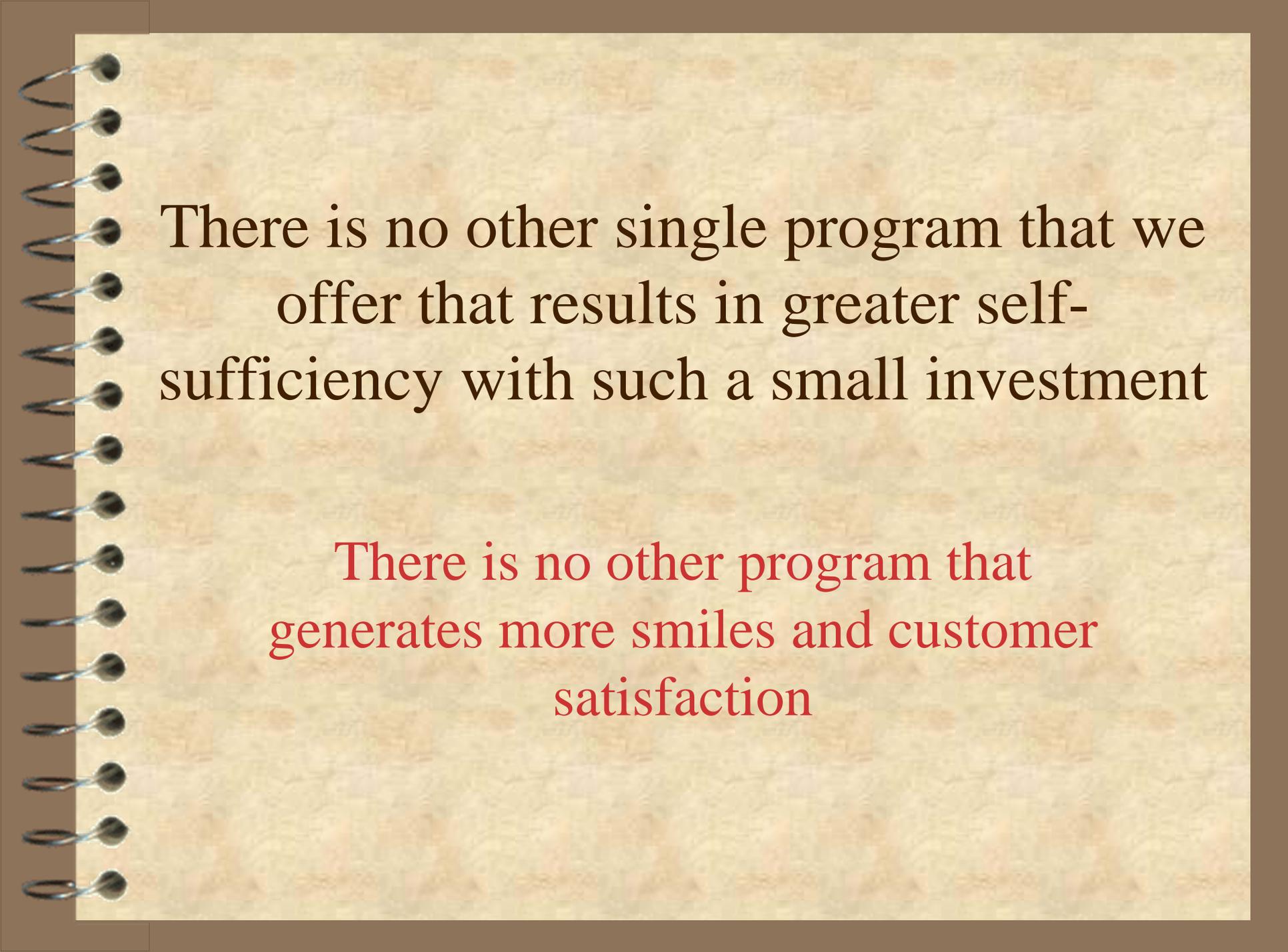
Meet Sally

Sally is the mother of three children, one in Head Start.

Sally had not claimed one of the children for the previous three years due to a divorce decree.

Amended returns were filed, resulting in an increase of \$6,000. Sally was able to pay off several overdue bills.



A spiral-bound notebook with a light beige, textured cover. The spiral binding is on the left side. The text is centered on the page.

There is no other single program that we offer that results in greater self-sufficiency with such a small investment

There is no other program that generates more smiles and customer satisfaction

Thank You

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