VITA Volunteer
Recruitment, Training, Retention, and Inspiration

Thursday, August 29, 2019 • 1:45 – 3:15 pm

Julia Cheng | Director of Tax Services & Development
Community Action Duluth, Duluth, MN
julia@communityactionduluth.org
Agency Intro
Amanda Peterson  
Logistics Coordinator

Kari Koehler  
Volunteer Coordinator

Deana Walls  
Site Coordinator  
Volunteer Training Manager

Julia Cheng  
Tax Site Director
Tax Site Volunteers – 2019 contributions

• 73 volunteers served 2368 hours

• 60 veterans (59% retention of 90 from 2018)

• 13 novices
Tax Site Volunteers – 2019 achievements

• 1179 federal returns

• 3281 total federal and state returns

• $2.965M in refunds
Workshop Overview

- Recruitment
- Training

5 minute break

- Retention
- Inspiration
Volunteer Roles

- Greeter
- Screener
- Assembler
- Preparer
- Reviewer

Non-tax preparing

Tax preparing
Volunteer Teams

It takes all types to build a strong team

...and servant leaders.
Recruitment
Head of the Lakes United Way offers a huge variety of volunteer opportunities year-round. In addition to the hundreds of opportunities we offer through our agency partners, we host unique projects in our area.

You want to make a difference. We make it easy. Head of the Lakes United Way has lots of opportunities that create positive change in our region. We can’t do it without you.
Academic Partnership

The College of St. Scholastica: Tax Site partner for 10 seasons

/Photo by Vclark1 - Own work, CC BY-SA 4.0, https://commons.wikimedia.org/w/index.php?curid=38555639

/Photos by Julia Cheng
Agency Website

https://www.communityactionduluth.org/free-tax-site/tax-site-volunteer

Tax Site Volunteer

Orientation
Free Tax Site
Tax Site Volunteer
Tax Volunteer Application
Coaching
Classes
Transportation
Community Engagement
Health and Wellness
MNtire/SNAP
Seeds of Success and Duluth Stream Corps

Tax Site Volunteers Needed
Community Action Duluth’s Free Tax Site team runs on the energy, heart and commitment of many volunteers. You can help in a variety of ways.

- Greet and register customers.
- Screen customers, helping them complete the intake process.
- Prepare tax returns using cloud-based software.
- Review tax returns for quality and accuracy.
- Assemble tax returns and conduct the client exit process.

Our clients generally lack access to affordable, professional tax preparation. One hour of your time can put an average of $1,750 in the pockets of individuals and families with low and moderate incomes.

For details on volunteering, see our Frequently Asked Questions below.
Welcome to DULUTH COMMUNITY EDUCATION

*Photo courtesy AndrewAchter.com

The FALL 2019 Community Ed Catalog will be available September 1st. Please check your mail boxes for the latest list of your favorite classes.

~
Agency Orientations

Events for December 2018

- **3rd December**: Tax Site Volunteer Orientation
- **10th December**: Tax Site Volunteer Orientation
- **14th December**: Tax Site Volunteer Orientation
- **23rd December**: Tax Site Volunteer Orientation
- **24th December**: Tax Site Volunteer Orientation
- **25th December**: Tax Site Volunteer Orientation
Internal Presentations

• Board of Directors
• Participants*
• Employees – financial coaches
• Donors ↔ Volunteers

* Consider how to reduce barriers ("Parity Project")
  o Child care
  o Transportation
  o Language skills
External Presentations

- Social action committees of churches, mosques, and temples
- Retirees, active seniors
- College and universities
  - Tax, business, and accounting classes
  - Social work departments
- Chamber of Commerce Young Leaders
- Lions, Rotary, other clubs
Media Management for Free Publicity

- Send press releases
- Be available for last-minute interviews

Community Action Duluth Looking for Tax Preparation Volunteers

Volunteers Will Be Trained Before Tax Prep Begins

December 11, 2017 by Andrew Kirov

DULUTH, Minn. – Community Action Duluth is looking for volunteers to help prepare returns this tax season. Volunteers are from all walks of life and can be any age from college students to retirees.

Claiming Earned Income Tax Credits

Local Urging to Contact Lawmakers

January 30, 2017 by Natalie Frostad

DULUTH, Minn. – This morning local advocates visited FOX 21 to talk about the earned income tax credit.
Principles: plan, plan, plan

• Assess needs
• Set goals and schedule
• Network
• Provide timely, accurate information
  • Consistent across all platforms
  • Convenient to access electronically
• Respond personally
• Require orientation
VITA volunteers
• provide an alternative to costly commercial tax prep
• help eligible workers claim valuable tax credits
• shield taxpayers from financial predators

“Taxes are a social justice issue.”

Waiting at CAD for doors to open, Saturday morning, 2010
/Photo by Julia Cheng
WHERE TAX AND MONEY GEEKS
UNITE!

When you volunteer, you’re giving back but you’re also getting in return. Meet like-minded people who love talking taxes and money, learn the nitty gritty through our high-quality trainings, join us for social events, and be a part of a team of geeks who are changing the world.

MEET LIKE-MINDED PEOPLE

We often hear volunteers say they’ve finally found their people. A place where they can connect with others who geek out over taxes, finances, and problem solving.

EXPAND YOUR KNOWLEDGE

We offer expert training to get you ready for your volunteer job. We dig into the nitty-gritty to equip you with knowledge and skill to help people with taxes, finances, and planning for the future.

HAVE A BLAST

We know how to make this work fun. Happy hours, game nights, contests, and more.
What has worked for you?
Training
Certification Paths

- Preparers
- Reviewers
- Site Coordinators
- Assistants

Volunteer Standards of Conduct Certification

Intake/Interview & Quality Review Certification

Site Coordinator Training

Tax Law Certification

Specialty Certifications

Form 13615 (October 2018)

Department of the Treasury - Internal Revenue Service

Volunteer Standards of Conduct Agreement – VITA/TCE Programs
Training Modes

• Custom Videos
• Classroom
• Link & Learn
• On-the-job
Link & Learn

• Volunteer Standards of Conduct
• VSOC, Basic, and Advanced training
• VSOC, Basic, and Advanced certification
• Health Savings Account
• Military
Link & Learn

VITA/TCE Central

Certification Tests

Login Name: [enter login name]
Password: [enter password]

- Login to your IRS account: [Login]
- Set up a new IRS account: [Create Account]
- Forgot Password? [CLICK HERE]
- Need Password assistance? Contact us by [clicking here].

Instructor Tools

- Classroom Presentations
- Lesson Plans
- Instructor Guide 4555e

More Help

- Getting Started Tutorial
- IRS Publications and Forms
- Get Adobe® Reader®

Quick Links

- Link & Learn Taxes Lessons
- Certification Test/Retest PDFs
- VITA/TCE Training Guide PDFs
- Evaluations
- Practice Lab
- VSOC Training
- Fact Sheet: Continuing Education Credits
- Intake/Interview and Quality Review Training
### 2019 Volunteer Training Schedule

#### January 2019

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Federal Tax Law DHS Computer Lab 5 pm</td>
<td>Federal Tax Law DHS Computer Lab 5 pm</td>
<td>Federal Tax Law DHS Computer Lab 5 pm</td>
<td></td>
<td>Tex Slayer DHS Computer Lab 9 am</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Reviewer Training CAD Conference Rm 5 pm</td>
<td>Tax Slayer EHS Computer Lab 5 pm</td>
<td>Assistants Training (1st year volunteers) CAD Conference Rm 5 pm</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>10</td>
<td>11</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Assistants Training (all volunteers) CAD Conference Rm 5 pm</td>
<td></td>
<td>Tex Slayer DHS Computer Lab 9 am</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Federal Tax Law CSS Tower 3121 5 pm</td>
<td>Assistants Training (all volunteers) CAD Conference Rm 5 pm</td>
<td>State Tax Law DHS Computer Lab 5 pm</td>
<td>Assistants Training (all volunteers) CAD Conference Rm 5 pm</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>17</td>
<td>18</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Tex Slayer CSS Tower 2412, 9 am</td>
<td>Tex Slayer Open Lab CAD Tax Suite, 9 am</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>20</td>
<td>21</td>
<td>22</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>State Tax Law CSS Tower 3131 5 pm</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>24</td>
<td>25</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Training Make-up Day CAD Conference Rm 5 pm</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>27</td>
<td>28</td>
<td>29</td>
<td>30</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Opening Day Monday CAD 4:30 pm</td>
<td>Opening Day Tuesday CAD 4:30 pm</td>
<td></td>
<td>Opening Day Thursday appointments CAD 11 am</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>31</td>
<td></td>
<td>Feb 1</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Opening Day Saturday CAD 8:30 am</td>
</tr>
</tbody>
</table>
Classroom – Custom Materials

• Prepare + Prosper tax law slides – custom edited

• Materials developed in-house
  • Affordable Care Act
  • State property tax credit
  • EITC and tax freedom graphics

• Paper form preparation

• TaxSlayer Online: hands-on training & open lab

• Tax Basics for Beginners
Gross Income

- **EARNED (from work)**
  - Hourly wages, salaries, cash payments, self-employment income
  - Early retirement payments due to disability

- **UNEARNED**

<table>
<thead>
<tr>
<th>Interest</th>
<th>Dividends</th>
<th>Capital Gains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement distribution</td>
<td>Pensions</td>
<td>Social Security</td>
</tr>
<tr>
<td>Gambling Winnings</td>
<td>Prizes</td>
<td>Unemployment</td>
</tr>
<tr>
<td>Cancellation of Debt</td>
<td>Taxable refunds</td>
<td>Rent received</td>
</tr>
<tr>
<td>Taxable scholarships</td>
<td>Gifts &gt; $14,000</td>
<td>AmeriCorps ed award</td>
</tr>
</tbody>
</table>
Gross Income $\rightarrow$ Taxable Income (2018)

- Single ($12,000)
- H of H ($18,000)
- Married Joint ($24,000)

Gross Income

Less Standard Deduction
2018 Earned Income Tax Credit: who qualifies?

- **0 kids**: Max benefit: $510, $6550 < income < $8250
  - Add $5590 to income for MFJ
- **1 kid**: Max benefit: $3400, $9.8-18.1k
- **2 kids**: Max benefit: $5616, $13.8-18.1k
- **3+ kids**: Max benefit: $6318, $13.8-18.1k
Clinic Shadowing

• Watch one, do one, teach one (well, not quite)
What has worked for you?
5 minute break
Retention
Community Action Duluth's tax site volunteer recruitment and retention strategy depends on running “a well-oiled machine” that provides excellent service and a positive experience for all involved. We present the solid results of past volunteer commitment – thousands of families served, millions of refund dollars infused into the local economy, and anecdotes of lives transformed.

Recruitment and retention begin with providing accurate, accessible, and consistent information on all web, print, and broadcast platforms about volunteer orientations, training sessions, and clinic hours. We are frank about the commitment, demands, and rewards of volunteering at the tax site, but believe our retention rate is high because the experience delivers as promised and the program honors volunteers for their contributions of time and treasure.

- FY2020 Application for Minnesota Department of Revenue VITA funding
Volunteer Incentives

- Build your resume service learning fulfillment, academic credit, or CEUs.
- Give back to your community
- Make a difference in your neighbors’ lives
- Build relationships across race and class lines

“How often do you get to do something where you’re working solely in someone else’s best interests?”

- Karen, 8-season volunteer tax preparer
Learn a **lot** about taxes

Ways to pay a tax bill:

- Withholding

- Taxpayer payments
  - Check or money order
  - Direct Debit from bank account

- Tax Credits!
Have fun
Join an award-winning team
Tax Site t-shirts – 100% cotton
Refreshments at clinics and trainings
Spend time with your friends

2015 State Tax law training, preparers’ group photo
...who become like family

2019 Volunteer Appreciation Dinner
What keeps you coming back?
Inspiration
Tax Prep is a Core CAP Agency Program

Strategic Priorities

**Anti-Racism:**
addressing historical and institutional disparities

**Community Engagement:**
involving us all to make the difference

**Public Policy:**
impacting structural barriers against self-sufficiency

A volunteer tax preparer advocates on behalf of a client.
Vinnie joined the 403(b) plan at work with tax site guidance.

Two years of wage deferrals, employer match and tax credits later, his retirement savings > savings median
What inspires you?
Thank you for attending!

Your feedback is important to the Partnership.

So we can continue to provide timely content, please complete a brief evaluation of this session on paper or in the Event App.