CAA/VITA Feedback Webinar 07/28 Notes

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Participants

- Blueprints for Washington and Greene County
- Shayla McGuire - Community Resources, Inc. in Wood County, WV
- CAPLP, Moorhead, MN
- Panhandle Community Services in Amarillo, TX
- People Incorporated of Virginia-Abingdon, VA
- Westmoreland Community Action-Western PA-East of Pittsburgh
- Michelle James CAAWC, Danbury, CT
- Rick Mallory, Clinch Valley Community Action, North Tazewell, VA
- Tracey Rector Ohio Heartland Community Action Marion Ohio
- Bonnie Greuel - SENDCAA, Fargo, North Dakota
- Bucks County Opportunity Council in Bucks County, PA
- Debbie Brown Site Coordinator at Community Action Marin, San Rafael CA
- Northwest Wisconsin Community Services Agency covering Douglas, Bayfield, Ashland, Iron, and Price Counties in Northwest Wisconsin.
- Michelle Mogck/Community
- Cheryl Shellhammer from Community Action, Inc Clarion/Punxsutawney
- Rebece Root-Mid Michigan Community Action Agency
- Domonique Williams VITA Program Manager at Wayne Metro Community Action Agency in Detroit, MI
- Cap Services Financial Empowerment Coordinator and Site Coordinator
- Sandy Winhofer CAA Supervisor/VITA Site Coord. Central Susquehanna Opportunities Inc CSO Northumberland, Columbia and Montour counties. 570-644-6575 ext. 418 swinhofer@censop.com www.csocares.org
- Vilma Martinez-Dominguez, COO, Greater Lawrence Community Action Council, Lawrence, MA
- Christina Vass, Community Services Director,Community Action Agency of Oklahoma City, Oklahoma/Canadian Counties, Inc., Oklahoma City, Oklahoma
- Renata Memole-Gwozdz - Assistant Director of Program Operations at Commission on Economic Opportunity of the Greater Capital Region (Troy, NY) rgwozdz@ceoempowers.org

Challenges for outreach responses

- Advertised VITA through Michigan

- We have offered VITA for 13 years, and we have a wonderful partnership with AARP TaxAide. Word of mouth, past taxpayer participation, cross-referrals.
- Our Board of Education sent our flyers to all elementary school student families via email.
- We did not have enough volunteers.
- I attended and spoke at our Head Start Parents' Meetings. We have 4 Head Start locations plus an Early Head Start program in our county. We also cover three other counties for Head Start, but they are handled by another CAA.
- Volunteers opting out due to Covid; Program leadership changing roles; Aging out of volunteers
- Not enough volunteers. no help to advertise from local newspapers.
- AARP was not filing returns in our area due to COVID
- Seniors also want their PA rent and property rebates completed so we get a lot of Seniors.
- We had a lot of seniors file their Rent/Property rebates as well in MN
- AARP also had only one site in our area, the Senior population has been hit hard by losing this service over the last two years with no real replacement service due to many VITA sites having capacity limitations. We saw huge senior numbers/demand.

Changes from previous tax season

- Fewer clients due to them paying for the service by January 1st
- Process was more complex with no in person tax prep
- Many people could not remember if they received stimulus money. Stopped us from doing taxes

Providing services after tax day 2022

- Fewer clients due to model change with COVID resulting in an increase in turn-around time. Many filed themselves which resulted in an increase in amendments. Challenges with volunteer retention.
- Similarly, we had a number of people who thought they did not receive the stimulus so we filed the Recovery Rebate & the IRS corrected it to $0 or them owing in because they did receive the stimulus payment
- We offer services year-round, but when it's not tax season, we offer an appointment-based only service, as we all have other responsibilities.
- We offer at the main office site, with year-round support.

What are best practices from your CAA/ VITA site this year?

- Operated five sites across the county
- Found pleasure in connecting tax assistance with other services such as rent assistance, housing, food insecurity
- Refer individuals to other services at the CAA has helped many individuals greatly by giving them the opportunity to meet with our coaches and work out a plan

- Homeownership program meets them where they are and drives them to homeownership and help them through the process and giving them access to those resources is the primary reason they can get a home, etc.
- Because of the IPEN issue we had to send out a paper return for one of our clients so they were able to get services through us and get the money for 2019 and then in April get their 2020 refund and then get 2021. We helped low-income tax payers in a short period of time to encourage them to maximize the dollars and use for the long term and that's what VITA helps us do, get them more services that our agency offers and get them more independent and economically stable.
- Operate by appointment only! It keeps things organized... as we all know tax season gets super hectic!
- Agree. That's how we do it.
- Most effective is partnering with an educational institution that throws its support for accounting students being a part of VITA - this means giving them credit hours!
- Appointment only that way clients come in prepared and do not get turned away
- Hybrid model of drop and go and in-person appointments. Info session with people coming in to connect to other financial resources
- What "vita software" are you referencing?
- Operate by appointment only, partnership with local universities for volunteers, and involvement in the local United Way Coalition for support.
- I'm brand new and seriously intimidated and not looking forward to VITA season 😟
- I was in your shoes this year with this tax season. But it's such a great program :)
- We do a super Saturday
- Helpful for preparing clients is setting up appointment by phone and then mail them all the forms needed before hand, a list of what to bring to the appointment, etc. has been super helpful for our agency
- We also partner with our Housing Authority to offer the service at those sites to reach clients with lack of transportation with low income.
- We also do intake and coaching and make it clear that it is separate from the tax process so we can track it in our client management software and connect to other services and have it for reporting. People have the option not to do that and still get their taxes done.
- In addition to appointments only, using Taxslayer, and partnering with a coalition/United Way, we use a in browser software called Get your Refund for our 100% virtual refunds.
- Its a great program.
- We partnered with immigrant service organizations to focus on the CTC this year for the first time.

What's a high point from this tax season?

- Send out info and they drop it off and come in to sign when it was completed and this was a very effective measure. They trust us enough to leave their paper work with us and impressed by how many people liked this method and how we ended up getting a lot of new clients
- Teaching volunteers how to read the tax returns and how to simplify it for clients and share with the clients some concerns and what they should be looking for with their refund amount, money

they need, etc. – so helping clients understand the logic behind their decisions on their W-4 form helps them know what they can and cannot do to get the most out of their tax returns
- A lot of happy tears, after a sharp increase in unemployment many were overjoyed to be able to pay bills
- So many single moms were incredibly relieved to learn they had this money available to help their kids & do something enjoyable
- I was amazed at the amount of people who didn't remember getting advanced CTC or knew about it prior to filing. We had to explain how it worked on many occasions and they were always so grateful.
- Returning volunteers, clients wanting to come back to do face to face. We provide satisfaction surveys at end of service. Client feedback is empowering and very pleasing. Many stated the comfort and confidence we offer in our service, making file taxes no longer uncomfortable.
- I noticed larger families were somewhat surprised that their actual refund was "smaller" than usual because they received the advance CTC.

What challenges did you experience with CTC/VITA work? What has your agency experienced? What lessons have been learned?

- Trouble with getting people into the office and doing face-to-face work by not seeing people so our capacity was overwhelmed and our turnaround time was like 15 days but our clients were very understanding of the situation and just really wanted the services were providing for them
- Retention issues brought on by the overlapping of services makes the organizational capacity continue to be pushed
- IRS funding does not provide sufficient funds for us to run a fully functional tax services program and thank goodness for NCAP because we have access to CSBG funds that helps us have more capacity and the dollars are not going up from IRS but we are getting more clients and then when funding from IRS increases so does dollar-for-dollar of each client at the agency level
- Challenges - getting volunteers to commit …. which has a snowball effect because you then take on all of the normal CAA duties on top of the busy tax season... it's just busy busy busy without volunteers
- A LOT of cases where the ex already filed & claimed the kids when they did not have the right to do so. Unfortunately, that meant the rightful parent had to paper file & continue to wait for the return
- Feels so nice to feel validated and we all have similar challenges
- A lot of people across the country are in the trenches as well
- Runs a county wide program that has four sites – rural area that are spread out
- We struggle with transportation and it decreased even more with covid
- Get your refund service is an online communication and document management system helped us
- Lookback with issues surrounding the volunteer retention
- We are a part of a larger tax coalition (Blueprints) within that larger coalistion we are tryin to figure out how we are going to get you more money from previous tax seasons and so we want

to figure out how to get the lookback and maybe some amendments that could help for next tax season

- For lookback we used training for volunteers and staff and if 2019 returns have a higher credit and what site they had their taxes prepared and if they weren't done at one of our sites we would ask them where they were provided and if they did not provide that information you can't get earned income on unemployment
- Before we shut down for the season we make sure that taxpayers especially those with children we make sure they have the lookback and ensure that if they have more from the lookback prior to the next text season in storage
- We had lots of volunteers that were unemployed and then found jobs during the tax season so they left and that left us short of volunteers.
- lessons learned - realize you are one person and have to learn your limits
- We did more taxes this past year than ever before because our AARP site closed. It made it hard to dedicate extra work to promoting CTC when we were barely meeting the needs of filers coming our way.
- We came up with a plan and filed tax return w/o the child that was claimed so they could get at least some $$ now and then filed a paper amendment
- Clients wanting to know when they will receive their refund. We have seen many that did not receive their stimulus dollars, had their refunds held for 12 weeks. Clients upset because of feeling they did not receive the stimulus and had their refund reduced.
- The past two years we operated completely virtual, with a drop-off option, due to Covid and agency internal protocols. This created issues with volunteers, keeping up with the need, and collecting needed documentation from taxpayers if they virtually uploaded their information (as opposed to dropping off).
- Challenges are also finding funding to operate, volunteer retention and restrictions on the VITA grant received from the IRS.
- We had a problem with people screened for income limits and then sending in documents that put over the income limits
- We use Get Your Refund here in Washington and Greene County.
- We had many clients use previous years income. We trained our volunteers to offer it
- many of our clients do not have computers, do not have internet, or has a computer but do not know how to deal with some of things that we ask them to do.
- reach out to your relationship manager - they offer reports
- and Tax Slayer offers reports that a site coordinator can pull themselves pretty easily too!!

What did NCAP do that was helpful? What more can we do?

- More frequent mtgs would be hugely helpful.
- I would love more meetings to be able to bounce ideas off each other for sure!
- I agree
- This was really nice to hear other CAA's successes and challenges- would love to do this regularly!
- More meetings

- This was my first meeting since I just started with the VITA program this past tax season. But it was very interesting to learn how similar all our agency'
- If there's also a way to forge connections with accounting professionals who have retired, that would be SO helpful in terms of volunteer numbers.
- More meetings and encourage participation.
- We have regular meetings in Virginia with VACAP, but we have a small pool of participants. It's nice to hear from this meeting today a broader spectrum of experiences and ideas.