



Lead a Tax Assistance Team

Overview

In today's economy, many working individuals and families are struggling financially. Becoming a Volunteer Income Tax Assistant (VITA) is one important way to assist those who are struggling. The VITA program offers free tax help for those with low to moderate incomes, elderly, persons with disabilities, or other individuals who require assistance in preparing their tax returns.

Many people who qualify for this service, and for special credits such as the Earned Income Tax Credit, may not be aware of the VITA program. By helping to educate people about this free service and serving inside a VITA location to help meet needs, volunteers can greatly impact their income tax experience. According to the Center on Budget and Policy Priorities, "in 2008, 24.6 million eligible families and individuals claimed Earned Income Credits worth \$48.7 billion and Child Tax Credit refunds worth over \$10 billion" ([Center on Budget and Policy Priorities](#), 2010).

VITA volunteer roles are not limited to assisting others with tax preparation. Volunteers can also conduct outreach, watch the children of families who are filing taxes, offer financial planning outreach and assistance, and much more.

Suggested Age Group

- Adults

Suggested Skill Level

- Moderate – difficult

Project Supplies

- Computer with internet access
- Phone



Project Instructions

1. Educate Yourself

- As a team leader responsible for recruiting and scheduling volunteers to support a VITA site you need to be educated on the benefits of the Earned Income Tax Credit, Child Tax Credits, and the Volunteer Income Tax Assistance (VITA) program. Resources and information are available at the three websites below:
 - Center on Budget and Policy Priorities
<http://www.cbpp.org/eitc-partnership/eitcfactsheet.htm>
 - IRS
<http://www.irs.gov/individuals/article/0,,id=96406,00.html>
 - National Community Tax Coalition
<http://www.tax-coalition.org>
 - National EITC Outreach Partnership
<http://www.cbpp.org/eitc-partnership/index.html>

2. Contact the local IRS Territory Manager

- The IRS Territory manager has a current list of all current VITA sites. Use the following link to get a list of local territory managers and their contact information. Contact the territory manager and ask for the closest VITA site.
 - <http://www.cbpp.org/eitc-partnership/territory-manager.htm>

3. Contact the local VITA site

- Once you've located the closest VITA site, make contact and express interest in helping. There are many roles that VITA volunteers can fill, such as getting trained to help others file their taxes, conducting outreach, providing child care, providing financial counseling, helping individuals learn how to open a bank account, providing guidance on what to do with the money/refund received, etc. It is important to secure a list of needs so that you can adequately recruit others to help fill their needs.



4. Define a Project Plan and a Timeline

- As you learn more about the needs of the VITA site you can begin to establish your project plan. Here are a few questions to help you get started planning:
 - Will you need to recruit volunteers to serve together at the same time or will you need to recruit and schedule volunteers to fill roles at different times?
 - When will you begin and end the project(s)?
 - What are your milestones in between?
 - What are all the tasks that must be completed along the way?
 - How will you measure success?
 - What resources are already available in the community to use?
 - What volunteer positions are needed?
 - What type of volunteer skills or requirements are needed to fill these positions?
 - Does the VITA site staff or volunteer contact have volunteer position descriptions outlining each of these roles?
 - Where can I find volunteers who would be excited about such a project?
 - How will you manage marketing and communications for this project?
 - What type of reflection activity can I lead volunteers through before, during and after the project?
 - How will I recognize the other volunteers?

5. Build Your Team

- Contact your friends, neighbors, family members, coworkers, local colleges and universities, places of worship, civic groups, associations, and businesses and spread the word about your project and ask them to get involved. You may want to print fliers, publish in the school/library newsletter, send emails, and use social media to mobilize your networks. Use whatever medium you can to get the word out and engage people in your effort.
- During your recruitment process be sure to talk with the potential volunteers about the roles they can fill and provide details about the role and the requirements for the position. This is your chance to help shape the volunteers expectations of the role. Don't forget to mention the required time commitment. This will help you match potential volunteers and their skills and interests with the available positions.



6. Schedule Your Volunteers

- Once you have recruited your volunteers you can now work with the contact at the VITA site to schedule the volunteers. You may be able to serve together as a team or you may need to serve at different times. You will need to work with your contact to get your volunteers scheduled to serve. Don't forget about the free technology resources Volunteer Spot, [://www.volunteerspot.com/](http://www.volunteerspot.com/), or HandsOn Action Centers, [://www.handsonnetwork.org/actioncenters/](http://www.handsonnetwork.org/actioncenters/), can provide that will make volunteer scheduling easy.

7. Raise Community Awareness

- No matter your volunteer position to support VITA, it is important to encourage your volunteer team to mobilize and conduct outreach to educate people in the community about the VITA program. Work with a contact at your local VITA site to get information for a flier. Create and post fliers at places of worship, community based organizations, places of employment, etc. Use the 2010 Outreach Campaign Toolkit listed in the Additional Resources section for fliers, posters, and tools to help in the outreach campaign.

8. Implement the Project

- Register and orient your volunteers
Provide a sign in sheet for volunteers onsite. Secure emergency contact information and have them sign any appropriate waiver forms. Be sure to review safety procedures and project instructions with volunteers. Sign in Sheet templates can be found at <http://www.handsonnetwork.org/volunteers/gethandson/toolkits>
- Don't forget to provide clear instructions to your volunteers for how to fill their identified volunteer role. It is always a good idea to have it written down in a position description so volunteers are very clear about the boundaries of the position. Templates can be found at <http://www.handsonnetwork.org/volunteers/gethandson/toolkits>

9. Reflect

- After your volunteer project, it is important to reflect on the experience and think about the impact of the project on the community as well as



what you learned about yourself and others. Here are some suggested activities:

- Tell your family and friends about something you learned and how you will continue to help others.
- Blog, draw a picture, write a poem, submit a letter to the editor
- Write about your experience on your Facebook account or Twitter feed.
- If you are working with a group of volunteers on this project, lead a group discussion with questions such as:
 - Why did you volunteer today?
 - What is one thing you learned about yourself?
 - What is the one thing that you will remember most about this service activity?
 - How can you continue to make a difference in your community?

10. Recognize

- After your project take a few minutes to reflect on the project with the volunteers.
- Everyone likes to be recognized for his or her hard work and achievements, especially volunteers. Show your volunteers how much you appreciate them and they are more likely to fully participate and return in following years. The following are some suggestions on how you can recognize your volunteers.
- Verbally recognize your volunteers' efforts, but also send a personalized note thanking them.
- Plan to recognize your volunteers at your next special event.
- Provide your team with a camera to take before and after pictures. Post the pictures in a visible public area.
- Recognize volunteer efforts through the media. Submit a press release and photo or write a letter to the local newspaper.
- Have a celebration recognizing the accomplishments of the volunteers.
- Give each volunteer a small token of your appreciation.
- Ask people who were particularly enthusiastic or helpful to join next year's planning committee or to take a leadership role.
- Take the feedback you get from your volunteers seriously. Thank them for their suggestions and make changes for next year.



Resources

- EITC Outreach Campaign Toolkit
<http://eitcoutreach.org/category/running-a-campaign-what-you-need-to-know>
- IRS and EITC
<http://www.irs.gov/individuals/article/0,,id=96406,00.html>
- National Community Tax Coalition
<http://www.tax-coalition.org>
- National EITC Outreach Partnership
<http://www.cbpp.org/eitc-partnership/eitcfactsheet.htm>
- VolunteerSpot
<http://www.volunteerspot.com/>
- Service Leader Toolkit
<http://www.handsonnetwork.org/volunteers/gethandson/toolkits>
- HandsOn Action Centers
<http://www.handsonnetwork.org/actioncenters/map>