

WELCOME!

2024 RAISE Texas VITA Conference

June 14, 2024

Raymond Nguyen
Director of Neighborhood Tax Center



AGENDA

01

Our
Founding

02

BakerRipley
Today

03

Neighborhood Tax
Centers



OUR FOUNDING





Established in 1907

as the Houston Settlement Association, BakerRipley was founded by a group of twelve women at the home of Alice Graham Baker, who became the organization's first President.

"Residents of every section of the city should have a fair chance at proper living conditions and moral surroundings."

– Alice Graham Baker (1907)



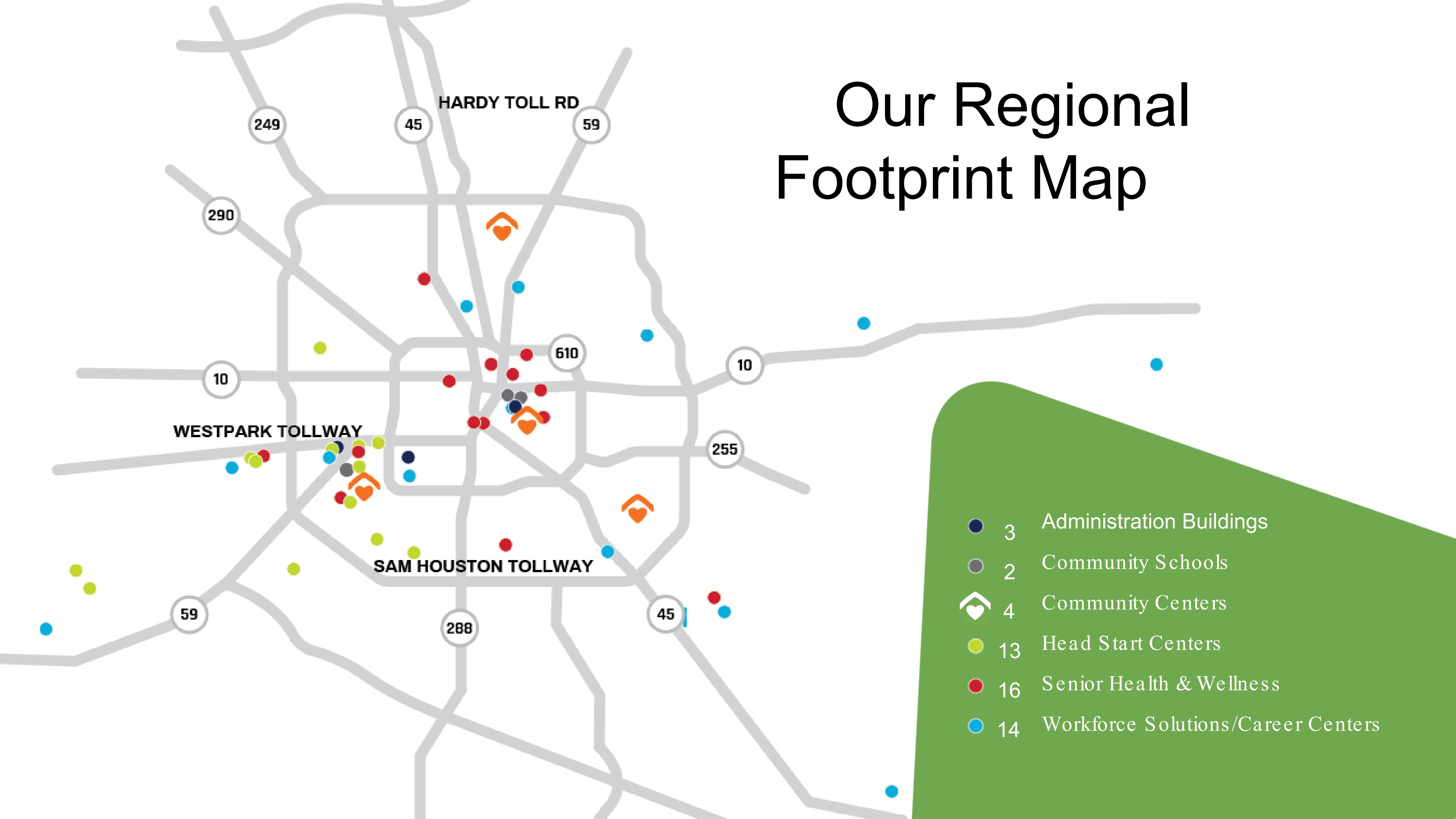
BakerRipley Today



BakerRipley stands as a beacon of hope and support for the diverse communities and neighbors we proudly serve.



Our Regional Footprint Map



EARN.

Entrepreneur Connection

Neighbors are able to grow their small business with resources, education, and access to capital.

Utility Assistance

Helps eligible households pay outstanding electricity, gas, and water bills.

Workforce Solutions Career Offices

A go-to resource for workforce development, training, upskilling, and scholarships.

Veterans Services

Our permanent housing program provides vital support to homeless Veterans and those at risk of becoming homeless.

Neighborhood Tax Centers

Free, quality tax preparation services for families and individuals earning up to \$58,000.

Weatherization Assistance

Increasing the energy efficiency of homes through improvements such as insulation, solar products and appliances.



LEARN.

Adult Education

Offers career and educational training and resources for adults seeking to enhance their professional career.

Head Start

Child development and family support services for children between the ages of zero and five years.

BakerRipley Community Schools

Educational institution for children between the grades of Pre-K and 8th grade.

Learning & Innovation Centers

Supports technology-centric learning in the areas of STEM, digital fabrication, and design thinking.



BELONG.

Civic Engagement

Helping neighbors take an active role in community decisions through voter engagement and leadership training.

Community Centers

Four centers across the Houston area for Neighbors to engage in numerous events, classes, food distribution, and health resources.

Youth Programming

Engaging after school programs, enrichment, and summer camps for children.

Immigration & Citizenship

Access to expert legal guidance, social services support, and citizenship forums for immigrants.



BE WELL.

Health Promotion

Evidence-based health classes that focus on managing chronic health conditions and increasing fitness.

Senior Health and Wellness Centers

Community centers equipped with activities to promote overall health and well-being for seniors.



“For anyone that’s feeling a little lost or needs a change in their life, or just wants a new challenge, come to the Tech Equity program at BakerRipley. It’s life-changing.”

- Yusuf



“The staff helped me a lot because they encouraged me to continue”

- Teresa



With help from the BakerRipley legal team, **Silvestre** overcame many obstacles (hearing impaired, unable to speak, limited education) to gain his citizenship.



The senior program gives **Ella** a reason to “keep going.”





BakerRipley

Neighborhood Tax Centers (NTC)

Neighborhood Tax Centers

Serving hardworking families since 2009

- **522,000+ Tax Returns**
- **\$723+ Million in Net Refunds**



NTC Services

14 full-time tax centers

15+ mobile sites

3 year-round centers

- **Current and prior year tax preparations (2018 – 2023)**
- **In-person services (walk-ins only)**
- **Remote option: [Getyourrefund.org/bakerripley](https://getyourrefund.org/bakerripley)**
- **Amendments and state returns**
- **ITIN Assistance (Form W-7)**
- **American Sign Language Interpreter (by appointment)**



2024 tax season

- **36,281 tax returns**
- **\$51.4M in gross refunds**
- **\$44.1M in net refunds**
- **\$17.4M in EITC**
- **\$8.49M saved in tax prep fees**
- **7 full-time staff**
- **56 seasonal staff**
- **308 volunteers contributing 15,794 hours**



NTC PROGRAM PARTNERS



Thank you!






BakerRipley

Correcting Rejected Returns

Stephanie Galarza
Program Coordinator/ERO

TRANSMITTING OFFICE





Client Liaisons

During Tax Season we have 2 to 3 Client Liaisons that:

- **Answer phone calls**
- **Go through voicemail and return phone calls**
- **Pull Acknowledgements**
- **Provide clients with information about our tax sites**
- **Help at tax centers when needed**



E-FILE PROCEDURES

SITE COORDINATORS:

- **Transmit E-Files everyday**
- **Package E-Files envelopes**
- **Couriers deliver packaged envelopes 3 times a week to transmitting office**

CLIENT LIAISONS:

- **Sort E-files by site**
- **Pull acknowledgements by site**
- **Separate accepted returns from rejected returns**
- **Separate rejected returns by rejection**
- **Correct the ones that can be correct without calling client and call clients when needed**



COMMON REJECT ERRORS



TOP REJECTIONS

- **ACA Form 8962: Marketplace Health Insurance/Missing 1095A Form**
- **Missing/Invalid IP PIN**
- **EIN Mismatch**
- **Name and/or Social Security Number do not match**
- **Social Security Number and/or Date of Birth do not match**
- **Dependent has been claimed as dependent by someone else**
- **Previously Accepted Returns (Mostly Previous Years)**



HOW WE HANDLE REJECTS

We correct rejections ourselves

Rejects that have to do with wrong Name, EIN, SSN, DOB for example (most of the time) can be easily corrected without calling the Clients.

Mailing out reject notice letters

Once we have contacted client 3 times and have not heard back from them, we mail out a rejection notice letter.

Calling Clients

We call client up to 3 times when returns are rejected for missing IP PIN, dependents claimed by someone else, and if the return is already filed.

Client Notes

Client notes are an important tool for us. We record every correction, phone call, and letter mailed out. This helps preparers when clients go back to the tax centers.





TRACKING SHEETS

BLUE TRACKING SHEET

The purpose of our Blue Tracking Sheet is to keep track of all the paper returns and returns that are left in progress.

RED TRACKING SHEET

Red Tracking Sheets are important because this form is filled out when client returns to tax center to correct rejected tax return.





BakerRipley

NTC Year-Round Operation



Year-Round Operations

3 Year-round centers and remote service remain opened from May-November.

- **Gulfton Sharpstown Center (Walk-In)**
Mon-Thu 10am -5pm; Fri 12pm-4pm
- **Pasadena Campus(Walk-In)**
Wed 10am-5pm
- **East Aldine Campus(Walk-In)**
Thu 10am-5pm
- **Remote Vita (Getyourrefund)**



Tax Season VS. Year-Round Tax Returns

Year-Round Returns:

- Rejections
- Amendments
- ITIN applications
- IRS referrals with transcripts
- Help clients that had filed an extension
- Prior Year Returns



Why operate a year-round center?

- **Client retention**
- **Potential to gain new clients**
- **Open doors for more funding opportunities**
- **Increase volunteer and seasonal staff engagement**
- **Does not require a lot of resources**



NTC Outreach and Marketing



Outreach & Marketing Timeline

End of April - June:

- Analyze the outreach and marketing plan/strategies from tax season
- Promote year-round services (opens in May)

June – Mid-October:

- Volunteer Recruitment
- Promote Volunteer Kick-off event in October

Mid-October – Early November:

- Develop social media campaign to promote volunteer opportunities
- Use general tax season flyer to promote services for the upcoming tax season

Mid-November- December:

- Campaign for Volunteer recruitment is live via social media ads and media opportunities.
- Confirm tax center and mobiles site locations for the upcoming tax season



Outreach & Marketing Timeline

Early January:

- Tax Season flyer is distributed (digital and hardcopies) among community partners, BR community centers, school districts, IRS offices, United Way 2-1-1, Harris County, and City of Houston.

Mid-January – April

- EITC Awareness Day
- Aggressive multi-media marketing campaign to promote free tax services
- Outreach to media outlets (Telemundo, Univision, KPRC, FOX)
 - Live TV Interview opportunities – Free advertising.
 - Phone banks



THANK YOU

