



BakerRipley

Neighborhood Tax Centers

Volunteer Program



Luisa Pereira

Volunteer Manager of BakerRipley
Neighborhood Tax Centers





Terje Odden

Training Manager of BakerRipley
Neighborhood Tax Centers



Neighborhood Tax Center Volunteer Team

- Tax Season (Jan-April 15th)
 - Certified Volunteers: 327
 - Active Volunteers: 308
 - Total Hours: 15,793.47
- Training
 - 679 volunteers trained
 - 360 in-person
 - 319 online self-paced
 - Volunteer Trainers 6
 - Volunteer Roamers 16
 - Total Training Hours 1,023



Volunteer Process & Requirements

1. Create a Volunteer Account
2. Attend an agency New Volunteer Orientation (All volunteers)
3. Background Check (18+)
4. Training
5. Certification / 13615 Form
6. Clearance Badge Sent
7. Select the preferred volunteer location
8. Register for an opportunity
9. Encourage a 36 minimum hour commitment.



Recruitment

- Outreach events
 - Marketing materials/Flyers
- Templates
 - New Volunteer/ Returning Volunteer
 - Stablished partners / New Partners
- In-person volunteer events
 - Kick-off
 - Tax Season Celebration
- Samaritan
 - Clear Process for volunteering
 - General all-year-round opportunity
- Tools
 - Google Drive
 - QR Codes
 - ScreenPal



Training Schedule

New Volunteer Training:

Three-Day Evening Training 6PM – 10PM

Two-Day (Full Day) Training 9AM – 5PM

Returning Volunteer Training:

One-Day (Full Day) Training 9AM – 5PM

Online Training

Both Returning and New Volunteer Training





Training Content

- Training consists of slide presentations and exercises
- Content is tailored to help volunteers pass the IRS Certification tests
- For new volunteers: Added exercises on topics typically seen at BakerRipley Tax Centers
- Hands-on exercises via PracticeLab
- Training is mandatory for new volunteers – optional for returning volunteers



Future enhancements and additions

- Update content with new tax law information
- Adjust exercises to align with the certification tests
- Add Webinars (live and/or recorded) to cover specific topics
 - 30-45 minutes each
 - In-depth coverage
- Examples
 - First day at the tax center
 - QR process
 - Education Credits
 - RRB-1099 explained
 - Child Tax Credit
 - Earned Income Credit
 - Etc ...



Retainment

- Special giveaways
 - Certification timelines
 - Hour requirement
- VLT (Volunteer Leadership Team)
 - Feedback
 - Engagement
- Samaritan
 - Weekly emails
 - Specific times
 - Program updates
 - Targeted emails



THANK YOU



BakerRipley

EARN.LEARN.BELONG.BE WELL.

