



RAISE TEXAS
BUILDING FINANCIAL SUCCESS

INSIGHTS

2023 RAISE Texas VITA Conference



Insights from the 2023 RAISE Texas VITA Conference

In June 2023, RAISE Texas hosted the first-ever Texas VITA Conference, bringing together Volunteer Income Tax Assistance (VITA) programs from all over the state to exchange ideas, discuss challenges, and learn how to improve and expand the vital work of VITA programs in Texas.



80
Participants

100%
Rated conference as very good or excellent

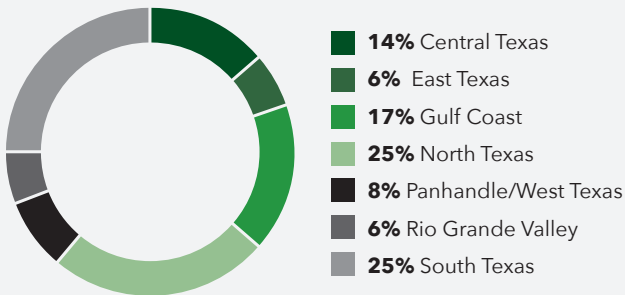


38
Organizations

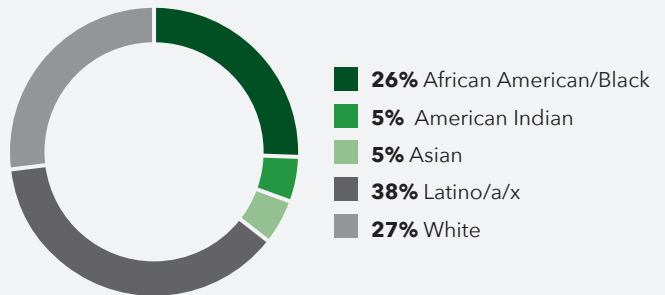
100%
Will use information they learned in the upcoming tax season

CONFERENCE BY THE NUMBERS

VITA Programs from All Regions of Texas



Demographics of Participants



Years of VITA Experience



This has been a very empowering event.

I absolutely loved the vibe. Great job, great team.

Hot off the Press: IRS Direct File Pilot Project

Bridget Roberts, Acting Transformation and Strategy Officer and Direct File Service Owner, IRS

The IRS recently announced it will launch a Direct File Pilot in 2024. Roberts acknowledged that many details still need to be addressed and expressed appreciation for our questions and input.

Anticipated features:

- Initially designed as a mobile app that will be available in English and Spanish
- Built as a question-based product
- Ability to save the return and finish it later
- Ability to download or print a pdf of the return
- Will allow tax credits and standard deductions
- Will not support Schedule C returns or tip-based income reporting

Q: Which target populations are most likely to be interested in Direct File?

Younger individuals who already self-prepare their returns and individuals who identify as English as a Second Language users.

TAKEAWAY: The IRS does not view Direct File as a potential replacement for VITA or commercial preparers, but rather as a complementary filing option.

Q: How will this Direct File option differ from the current Free File option?

Filers will not have to use a middleman to file, such as Turbo Tax, H&R Block, etc.

Q: Will Direct File have a quality review process?

No. The accuracy of the return will be based on the information submitted by the taxpayer.

Q: Does the IRS think Direct File will be used in lieu of TaxSlayer?

No. The scope for the Direct File Pilot is narrower than VITA's scope and how VITA uses TaxSlayer.

Outreach

SOCIAL MEDIA

Foundation Communities learned the following from working with Blackhawk Digital Marketing:

- Use pictures of real clients, not stock photos.
- Aim to create posts that people will share. Also, tag partners in your posts to generate free advertising.
- Make sure the user experience requires minimal clicks to get the who, what, when and where details.
- Create and track different versions of your ad to see which is most effective (A/B testing).
- Ads need a clear call to action, such as book now or contact us buttons.

EARNED MEDIA

Cristina Cave, Community Relations Senior Manager, BakerRipley

- Connect with local news departments, assignment desks, and consumer reporters.
- Position your program as a go-to resource for tax stories by always answering the phone and having a spokesperson available who is current on tax and related news topics.

- Create a pitch calendar with topics you are ready to share. Examples:
 - Updates to services (locations, partnerships)
 - Changes to tax law, tax credits, or IRS operations
 - Tax filing deadlines
- When talking about your services:
 - Be short and to the point.
 - Share who, what, when, where, and why.
 - Confirm the contact information is correct.

RECOMMENDATIONS FROM THE FIELD

- Radio: Take advantage of community outreach segments.
- Put flyers at libraries, community centers, and senior centers.
- Schedule water bill inserts early in the tax season.
- Send postcards to all previous clients with "Or Current Resident" in the address.
- Educate clients on the consequences of unethical tax return preparation.

Volunteers

7-STEP VOLUNTEER ENGAGEMENT CYCLE

Jackie Cuéllar, Director of Corporate and Volunteer Engagement, Foundation Communities

Foundation Communities in Austin has a stellar record of recruiting and retaining VITA volunteers. Key to their success is a dedicated volunteer engagement team that focuses on creating a “best-in-class” volunteer experience.

- 1. Recruitment:** Start with your existing pool of volunteers and then think outside the recruitment box, including partner organizations and clients.
- 2. Initial Contact: Always respond promptly!**
 - Connect with volunteers within the first week after they sign up.
 - Set clear expectations by sharing a volunteer position description.
- 3. Training**
 - Approach training with the attitude that it is your program’s responsibility to ensure your volunteers are adequately trained.
 - Reduce barriers to training attendance and certification completion.
 - Be available and willing to answer all volunteer questions and to offer 1:1 support as needed.
 - Follow up to help volunteers stick to their deadline.
- 4. Volunteer Experience**
 - Train staff to provide a best-in-class volunteer experience.
 - Use a “It’s my first day” checklist for volunteers.
 - Call volunteers within a day after their first shift to get feedback and address any issues promptly.
 - Provide constant communication and support throughout tax season.
 - Provide volunteers with a reliable contact who is committed to providing a best-in-class experience.
- 5. Evaluation/Assessment**
 - Solicit feedback from volunteers and staff after training, after the first shift, during tax season, and at the end of tax season.
 - Act on issues and follow-up so people know their concerns were heard.
- 6. Retention**
 - Learn and use your volunteers’ names.
 - Acknowledge repeat volunteers.
 - Provide treats and snacks.
 - Send handwritten, personalized thank you notes.
 - Share individual VITA impact data with each volunteer, including the number of returns they individually prepared and refund amounts.
 - Spotlight volunteers on your website and social media.
 - Recognize milestones in years of volunteer service.
 - Celebrate volunteers during Volunteer Appreciation Week.
- 7. Recurring Service:** Providing a “best-in-class” volunteer experience will make it easier for your volunteers to say yes again next year!

Training Option

Florida Prosperity Partnership (FPP) offers a virtual VITA certification training course for volunteers and staff from VITA programs across the country.

- Available late November through early February in English and Spanish
- Four 3-hour sessions (12 hours total) offered daytime, evenings and Saturdays
- Prepares participants for Advanced Certification
- Covers use of TaxSlayer software
- Cost is \$29 per person (subject to change)
- Contact VITA@fppcoalition.org

Operations

FUNDING:

- Diversify funding to reduce dependence on a single source. Potential funders include city and county government, banks and credit unions, and IRS VITA, TCE and LITC grants.
- If you receive a VITA grant, pitch 1:1 leverage of federal funding that doubles the funder's investment.
- Explain the return on investment: invest \$x and we'll generate \$xxx in refunds within a few months. Share the cost per return and average financial impact on households.
- Ask for in-kind support, such as printing flyers or providing snacks and gifts of appreciation to volunteers.
- Making the Case: Jason Saving from the Federal Reserve Bank of Dallas shared how EITC and CTC contribute to economic growth by giving workers a higher hourly wage when added to their annual income.

WHAT IRS SPEC CAN DO FOR YOU

- Loan laptops, printers and printer cartridges.
- Provide information on grants and funding opportunities.
- Offer Site Coordinator training and train-the-trainer support.
- Hot Tip: While your IRS SPEC Representative cannot ask for funding on your behalf, they can accompany you when meeting with a potential funder to help support your case for funding. They can also provide suggestions for the IRS VITA grant application.

WHAT YOU NEED TO KNOW ABOUT ITINS

Janet Herrgesell, Tax Program Manager, Foundation Communities

- **Challenges:**
 - W7 generated from TaxSlayer is incorrect.
 - W7 instructions are incomplete. Learn through experience, talking with CAA line, Internal Revenue Manual, etc.

- Mistakes can cause immediate rejection or significant delay in ITIN approval and tax return processing.
- IRS is very particular with school record requirements.

- **Recommendations:**

- Review the W7 from TaxSlayer Pro Online carefully.
- If name on the W2 does not match ITIN application and the IRS sends a letter questioning this, submit pay stubs and/or bank deposits to substantiate.

- **To provide accurate ITIN Services:**

- Treat ITIN services like case management.
- Provide clients with a way to contact you during the application process and after the paperwork is submitted.
- Compile everything you learn and continually reference it.
- Assign a lead person to call CAA line with questions and do an annual training.

PROTECTING CONSUMERS FROM TAX SCAMS

Mandi Matlock, Staff Attorney, Texas Rio Grande Legal Aid

Contact a Low Income Tax Clinic (LITC) when you see these scams:

- Solar Panel Tax Scams make false promises of large tax refund checks and no electric bills. Potential relief includes undoing the contract, getting payments returned, and having shoddy equipment removed from homes.
- Refund Anticipation Loans (RALs) with inadequate disclosures of high interest rates or a bank account opened in consumer's name.

SUCCESS WITH TAX TIME SAVINGS

Foundation Communities offered a \$10 gift card to taxpayers who directed at least \$50 of their refund to a savings account- or savings bond. 1,218 taxpayers participated and saved over \$2 million!

“

I took more notes at this conference than I ever have at any other conference!

”

“

Very well organized and the energy was contagious!

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Program Highlight: San Antonio

The City of San Antonio invests heavily in VITA because it improves financial stability and provides a significant return on the investment through the federal tax credits claimed for residents.

Another driver for the city's support is that an estimated 20% of EITC eligible taxpayers fail to claim the credit. The city recognizes that increasing the number of EITC filers by even a small percentage brings in millions of additional dollars to the local economy.

INNOVATIONS:

- Budget includes paid staff to manage and prepare returns so sites can always operate.
- 75% of returns were prepared through drop-off services available at VITA sites.
- Offer low-cost, no-interest Refund Anticipation Loan with River City Federal Credit Union.

RECOMMENDATION: Partner with your city's Community Action Department.

2023 San Antonio Snapshot



61

Volunteers



30

Temporary
Staff



21,517

Tax
Returns



\$28.6M

in Total
Refunds



\$5.4M

Saved in Tax
Preparation Fees

Visit raisetexas.org for slides and resources from the Texas VITA Conference

Thank you to Wells Fargo for supporting RAISE Texas and our work to expand VITA in Texas!



**WELLS
FARGO**

