

The Keys to Establishing a Successful VITA Site

by Joyce Robbins, Senior Tax Specialist,
Internal Revenue Service

Financial solvency and stability can be elusive to many low-income workers. In the event of financial shocks that result in lost wages, a "nest egg" can mean the difference between having a residence or being homeless. For low-income working families, the additional income provided from the Earned Income Tax Credit (EITC) is important. That's why volunteers, organizations and businesses who offer free income-tax preparation, check cashing and counseling can make a difference.

An important first step for claiming the EITC is filing an accurate tax

return. That's where the Volunteer Income Tax Assistance (VITA) program fits in. The Internal Revenue Service's VITA Program offers free tax help at sites with volunteers who prepare and electronically file tax returns for lower income taxpayers (generally those making \$39,000 and below) individuals with disabilities, non-English-speaking people and others on limited incomes who find it difficult to pay for commercial tax preparation assistance.

Volunteers sponsored by various organizations receive training to help prepare basic tax returns in communities across the country. VITA sites are generally located at community and neighborhood centers, libraries, schools, shopping malls and other convenient locations. Most of these locations offer free electronic filing.

Communities are unlikely to be saturated with VITA services, especially since VITA taxpayers typically do not have the resources to travel long distances for assistance. So any group planning to offer effective VITA services should consider the following tips.

Start Early

People who go to VITA sites to have their taxes prepared usually expect refunds. Volunteers should begin planning their EITC efforts in the fall prior to the tax year. Your site needs to operate mid- to late January each year.

Determine where you will recruit your volunteer base. Most groups want to settle on a location and then select volunteers. However, where you find volunteer preparers will likely determine your site locations. That's not to say that you



can't pick a location first. But if you do your volunteers may have to cross town to get to your site, and volunteers who are inconvenienced will tend not to stay with your program very long.

Work with Volunteers to Find a Good Site Location

Several characteristics make a good site location. First, your site should be in a stable location that is available each year. Second, the site should "belong" to everyone in the community. Libraries and community centers often make good choices. Banks and churches may also work but they may feel less inclusive. Third, the site should allow easy access. If the serviced population uses public transportation, then the site needs to be on a public transportation route. For clients who drive cars, try to make parking available and choose a location that is easy to find. Be sure to analyze potential sites to ensure they serve the targeted population and do not present barriers.

Arrange for Volunteer Training

You can order Link and Learn training for volunteers through the IRS or through www.irs.gov. Your organization can provide classroom training or a self-study option for its volunteers. Frequently, certified VITA instructors double as volunteers. Regardless of how volunteers are trained, each must pass a test to become certified before preparing tax returns.

Obtain Equipment and Supplies

You will need computers for electronic filing and Internet access for transmitting returns. (Returns can be prepared at a VITA site but transmitted from another location, if necessary.) Your site should be equipped with a printer, computer paper, toners and diskettes.

Conduct a Marketing/ Publicity Plan

Just as you had a marketing plan for recruiting volunteers, you will need one for getting taxpayers to utilize your services. Use the media to reach your targeted audience. Building a VITA program is much like building a business and you cannot have too much publicity, especially during the first few years.

Recognize Your Volunteers

This may be as simple as providing doughnuts on the last day the site operates or a thank you note to each volunteer. Volunteers are the backbone of any VITA program, so make sure they feel appreciated. Finally, VITA site coordinators need to relax and enjoy the summer knowing that they have helped people claim money that they may not have known about. For some of those taxpayers, this will be the first "savings" of their lives and the beginning of the road to financial stability.

Joyce Robbins has worked for the IRS in Columbia, South Carolina since 1981. She received her undergraduate and graduate degree in social work from the University of South Carolina. She is also a member of Midlands Association of Volunteer Administrators, a professional association of managers and supervisors of volunteers.

Number of Returns Prepared by Volunteer Organizations

(Volunteer Income Tax Assistance Programs, Tax Counseling for the Elderly, etc.)

2003

