



VITA 101

Putting It Into Action

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Community Tax Aid



Community Tax Aid

- ▶ Celebrating 30 years!
- ▶ 15 sites in DC, Maryland, VA
- ▶ Staff of 3
- ▶ Largest site served almost 2,000 tax payers
- ▶ Smallest site (new this year) about 60 tax payers
- ▶ Year – round tax preparation
- ▶ Coordinated some controversy representation with pro bono attorneys



How do we do it?

- ▶ Host sites include:

- ▶ Non profits (Jubilee Jobs, East River Family Strengthening Collaborative, H.O.P.E, CentroNia)
- ▶ Government partners (City of New Carrollton, Alexandria, Arlington)
- ▶ Libraries (Rockville Library, formerly, the MLK Library in DC)



Who runs the site?

- ▶ Each CTA site is staffed with the following:
 - ▶ Client Coordinators: help taxpayers gather documents, make copies, determine if tax payer is basic or advanced
 - ▶ Greeter (for bigger sites)
 - ▶ Reviewer: Reviews tax returns after they have been prepared
 - ▶ Site Coordinator: In charge of running site. Liaison to CTA.
 - ▶ Tax preparer: volunteers who prepare taxes
- ▶ We don't always have a client coordinators on site. They are a crucial Position to each site.



Yearly Timeline

We must identify our sites by they fall prior to the start of the season.

- ▶ **October/November**

- ▶ Volunteer recruitment
- ▶ Training Materials
- ▶ Securing space for training & sites
- ▶ Finalization of Tax sites sent to IRS

- ▶ **December**

- ▶ Staff interviews
- ▶ Trainings

- ▶ **January – April**

- ▶ Tax season in full swing

- ▶ **May**

- ▶ Pick up supplies and equipment from sites
- ▶ Compile data: volunteer hours, statistics
- ▶ Celebrations! (Volunteer recognition event)

- ▶ **June/July/August/Sept**

- ▶ Year round preparation



The importance of partnerships

- ▶ Partnerships must be established before the beginning of tax season and with enough advance to ensure that all requirements from the IRS have been met.
- ▶ We cannot set up or prepare taxes for one day at random
- ▶ We have to follow guidelines on space, neighborhood, staffing, and ADA compatibility.



Volunteers make this happen!

- ▶ CTA has over 500 dedicated volunteers. We recruit our volunteers from:
 - ▶ Georgetown University
 - ▶ American University
 - ▶ Local nonprofits
- ▶ They have to take the outlined training by the IRS and certify at a Basic or Advanced level to prepare taxes.
- ▶ Even when we have site available for use, without the volunteers we would not be able to make it work.

