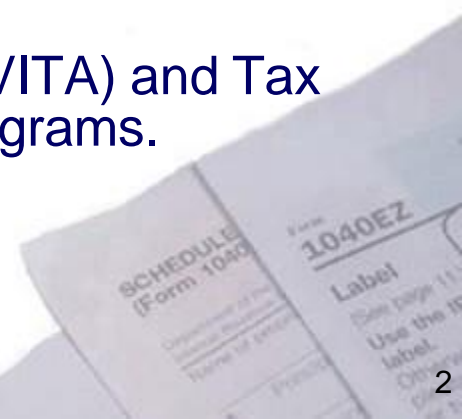


# Partnering to Deliver Free Tax Services

Stakeholder Partnerships, Education and Communication (SPEC)

# Internal Revenue Service

- In the IRS, the Wage and Investment (W&I) Division provides tax processing, compliance, and customer service for virtually 125 million individual taxpayers.
- W&I includes three campuses that process tax returns and other tax documents; 23 sites that provide account management (toll-free and correspondence) services; and many field operation sites that provide direct taxpayer assistance.
- Stakeholder Partnerships, Education & Communication (SPEC) is the Outreach and Education arm of the Wage and Investment Division of the IRS.
- SPEC partners with community based organizations to gain access and provide service to lower income, elderly, disabled, Native Americans, non-English speaking and rural populations.
- SPEC manages the Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) free tax preparation programs.



# SPEC's Business Model

SPEC partners with 70 National Partners, over 375 coalitions, and 4,700 local partner organizations of all types:

- Corporate
- Faith-based
- Nonprofit
- Educational
- Financial
- Governmental
- Public service

## SPEC Business Model



# Maryland, DC, VA & WVA 2016 Results

- Completed and e-filed over 170,000 volunteer returns (with 3,100,000 *free federal tax returns and over 2 million state returns nationwide*)
- 100 plus partners, sponsored over 350 local sites (*more than 12,000 nationwide*)
- Approximately 4,000 individuals in our area volunteered to help their communities through the VITA program (*more than 100,000 volunteer nationwide*)
- Over 32,000 returns received EITC refunds by taxpayers served at local sites (*over \$3 billion in tax refunds nationwide at the federal level*)



## Online Tools and Resources

- **File or E-file a Return**
- **Check Refund Status**
- **Get a Tax Transcript**
- **Payments and Penalties**
- **Correct/Amend a Return**
- **Identity Theft, Fraud and Scams**
- **Letter from the IRS**
- **Affordable Care Act (Health Care)**

## Overview of the Volunteer Income Tax Assistance (VITA) Grant Program

In December 2007, Congress appropriated funds to the Internal Revenue Service (IRS) to establish and administer a matching grant program for community volunteer income tax assistance. The funding allowed the Stakeholder Partnerships, Education and Communication (SPEC) organization of the IRS to provide grants to partner organizations to achieve the following program objectives:

- Enable VITA to extend services to underserved populations in hardest-to-reach urban & rural areas;
- Increase the capacity of targeted taxpayers to file returns electronically;
- Heighten quality control;
- Enhance training of volunteers;
- Improve the accuracy rate of returns prepared at VITA sites.

The VITA Grant program supplements the VITA program, which was created in 1969. VITA provides underserved communities with free tax filing assistance. The VITA Program uses trained volunteers to prepare basic tax returns for low income taxpayers in both urban and non-urban locations, persons with disabilities, non-English speaking persons, elderly taxpayers and Native Americans. All grant recipients are required to follow existing guidance governing VITA site operations and to file all eligible returns electronically.

### **Guiding Principle**

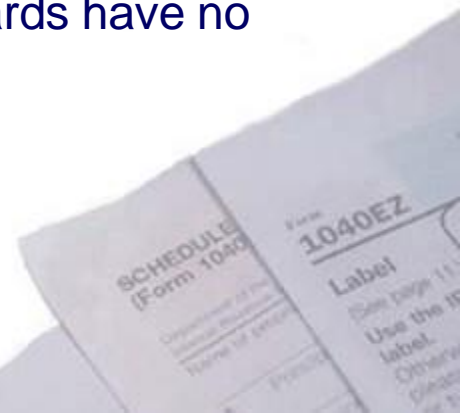
Grant partners are expected to show incremental increases in return preparation each year.

### **Measures of Success**

- Grant recipients are expected to achieve 100% of the return goal specified in their grant agreements.
- Grant recipients are expected to become more efficient each year with grant funds provided for their program. Any organization that received a grant in a prior year should prepare more returns with a similar amount of funding in the current year, reducing their cost of preparing returns.

# Financial Education & Asset Building

- IRS recently eliminated the “Debt Indicator” that was used by tax preparers and financial institutions to facilitate refund anticipation loans or RALs. Taxpayers are encouraged to use the following options to obtain faster tax refunds:
  - Direct Deposit - is the fastest, safest way to receive a tax refund. An e-filed tax return means a fast refund. Taxpayers who combine e-file and Direct Deposit can get their refunds in as few as 10 days.
  - Savings Bonds – taxpayers may purchase U.S. Series I Savings Bond for themselves and up to two others individuals. The remainder of the refund may be direct deposited or issued in a paper check.
  - Prepaid Debit Cards – taxpayers with or without bank accounts may load their refunds on a stored value card. Most of these cards have no or very low transaction fees compared to check cashing establishments.





<http://win.web.irs.gov/spec.htm>

## Site Coordinator Corner

This page is designed for you, the Site Coordinator. Here you will find those items you need at your site to make it efficient, quality-focused and customer friendly. While [Publication 1084, IRS Volunteer Site Coordinator's Handbook](#), is the primary source of information for volunteer program coordination and site management, we hope you will find additional information here that will make your job easier.

Whether you are a returning Site Coordinator or brand new, the part you play is critical to the success of a volunteer tax assistance program. We welcome any suggestions or recommendations you may have to improve any aspect of the volunteer program.

## Site Coordinator Tools

### Filing Season Readiness Training

- [National Site Coordinator Training Video](#) (Please register to launch the video)
  - [Site Coordinators Power Point](#)
- [ACA Application Training Power Point with notes](#)
  - [Fact Sheet – ACA Application Training for Partners](#)
  - [ACA Application and Possible Errors](#)
  - [Guidelines for Quality Reviewing ACA Issues](#)
  - [How ACA could be reported on the Tax Return](#)

## Filing Season eBooks!

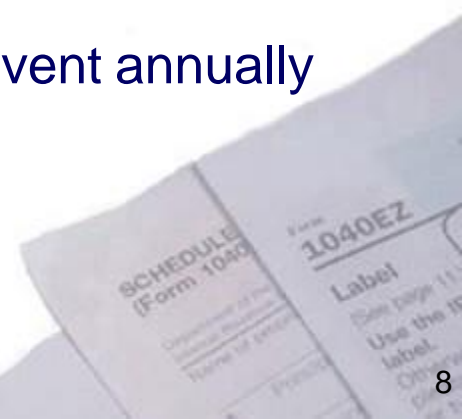
eBooks are provided in the ePub format may be accessed on tablet or mobile devices. eBooks support the features and capabilities partners and volunteers want in electronic products including:

- Ability to work on most mobile devices
- Information automatically fits to the screen size of the device
- Ability to resize text graphics
- Ability to interact with hyperlinks
- Ability to highlight text
- Ability to record notes/comments and add bookmarks
- Contains interactive table of contents
- Contains key word search function

# Strengthen Communities through Partnerships

Working collaboratively we can:

- Encourage employees, the business community, residents and students to volunteer for VITA and Financial Education and Asset Building (FEAB).
- Inform low to moderate income faith-based clientele about free tax preparation and FEAB at VITA sites.
- Partner to:
  - Sponsor VITA sites in their local community
  - Participate in the National Earned Income Tax Day Event annually
  - Sponsor a FEAB Day starting next filing season



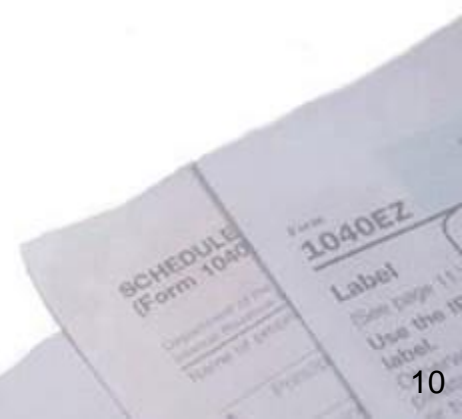
# How to Host a VITA site?

- Convene initial community meeting
- Form core planning/working group
- Contact IRS-SPEC at [partner@irs.gov](mailto:partner@irs.gov)
- Some attributes of a model VITA site:
  - Site preparation
    - Secure site locations, provides computers and supplies
    - Installs/maintains IRS provided software
  - Volunteers
    - Develops recruitment methods to attract potential volunteers
    - Provides instructors for all training
  - Tax Preparation
    - Ensure the use of reference materials
    - Provide Quality Review Process



# How to Volunteer at a VITA Site?

- If you have members interested in becoming a volunteer, and they need to find an organization in their area, they can send an email to [taxvolunteer@irs.gov](mailto:taxvolunteer@irs.gov)
  - Their name will be forwarded to the appropriate local IRS office
  - For locations and hours of operation of a community VITA site:
    - Visit [www.irs.gov](http://www.irs.gov) (Keyword VITA)
    - E-mail IRS at [taxvolunteer@irs.gov](mailto:taxvolunteer@irs.gov)



## Connect with Community Based Organizations?

---

- SPEC has built a network of national and local partners
  - IRS will facilitate discussions between you and our over 375 coalitions and 4,700 local partner organizations
  - Client-based organizations include corporate, faith-based, nonprofit, educational, financial and government





# For More Information

---

Loren D Johnson

Senior Tax Consultant

Stakeholder Partnerships, Education & Communication

Richmond Territory

[loren.johnson@irs.gov](mailto:loren.johnson@irs.gov)

(804) 916-8727

