



## **Tax Talk Thursdays with Community Action of South Mississippi & New River Community Action**

*Creating a positive volunteer experience*

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Presented by the Center on Budget and Policy Priorities' Get It Back Campaign

### **Presenters:**

[Lee Ann Kendrick](#) – Director of Adult & Community Partnerships, Community Action of South Mississippi

[Hope Sims](#) – VITA Site Coordinator, Community Action of South Mississippi

[Molly Moulder](#) – VITA Site Coordinator, New River Community Action

### **Creating a Positive Volunteer Experience**

#### **Molly Moulder, New River Community Action**

##### **Volunteer Recruitment**

- Contact colleges in your area (community colleges or vocational programs) and see if you can set up any internships to incentivize younger volunteers
- Cultivate strong relationships with volunteer organizations in your area
- Be a host organization for a local [Senior Community Service Employment Program \(SCSEP\)](#) if you need to fill larger roles such as another site coordinator
  - Able to place trainees in other roles with the organization at the end of the tax season
  - SCSEP employees are paid, but not by the VITA program

##### **Volunteer Orientation**

- Set up a one-on-one orientation with volunteers (if possible) to help coordinators reduce volunteer intimidation and overwhelm after the training

- Ask questions to get to know who your volunteers are and their motivations for being there:
  - Are they a retiree wanting to fill some time? Are they an accountant willing to share their skills to better the health of the community? Are they a college student looking for experience?
  - What is the volunteer's goal, and how can you help them achieve it?
    - Express expectations for client confidentiality, training, etc.
- Clearly explain your VITA program
  - What is the time commitment? How do you stay in contact during the tax season? How involved are you as a coordinator during tax time (# of sites, office hours, etc.)? What site model do you use and how does this impact volunteers' role and placement?
- During the orientation, ask open-ended questions (e.g. What are you most excited for during your time as a VITA volunteer? Why?)
  - Practice these skills to help volunteers feel welcomed and valued: 1) actively listen, 2) pause and reflect, 3) maintain eye contact
  - Volunteers are more likely to return if they feel listened to and understood

### **Volunteer Scheduling**

- [Volgistics](#) is a volunteer management software tool. Features include:
  - Tracking volunteers' skills, background screening, tracking the volunteer onboarding process, assistance with volunteer recruitment, and volunteer self-scheduling

### **Volunteer Training**

- [My True Prosperity](#) is a fast-paced, flexible, and engaging online learning platform for VITA volunteers
  - Training includes intake, interview, quality review, advanced IRS certification, and some tax law and TaxSlayer topics
  - Volunteers can choose when to attend training which is delivered in four, three-hour sessions over Zoom
  - It includes resources and links to VITA publications such as 4012, 4491X, and 969
- Other useful training tools include [Link & Learn Taxes](#), [TaxSlayer Practice Lab](#), and [VITA Practice Scenarios](#)

## **Volunteer Recognition**

- Draft a plan for volunteer recognition events before the season ends
  - Consider volunteers' age range and availability for an event
  - Ask volunteers what they would like to see for their recognition event
- Prepare personalized gifts
  - Handmade gifts can show appreciation for the time and effort volunteers dedicate (e.g. creating handmade letters)
  - Seek feedback and give a season rundown that includes how the volunteers contributed (e.g. milestones reached, how many people were assisted, etc.)

## **Lee Ann Kendrick & Hope Sims, Community Action of South Mississippi**

### **Volunteers**

- Retired professionals: recruit through partner agencies and at meetings for the Chamber, Kiwanis, and the Lion's Club
- CPAs: advertise in places where people are looking for continuing education units (CEUs)
- Retired military: have a VITA site on a military and training base; many retirees are looking for something to do and a way to give back
- Staff: receive an additional 8-hour PTO day for every 20 hours of volunteer time
- VITA program officer: connects those interested in the IRS and tax filing with the VITA program
- Other:
  - Volunteer websites such as [Volunteer.gov](https://www.volunteer.gov) and local sites
  - Billboards may help, but aren't recommended unless it is affordable

### **Volunteer Appreciation**

- Start by making sites as comfortable as possible throughout the season; provide snacks and beverages that people like so they feel welcomed
- Host an end of season luncheon to celebrate accomplishments and talk with volunteers about returning
  - Funding for volunteer appreciation can be scarce, so try to tap into local funds
- Provide handwritten notes with personalized messages for every volunteer
- Communicate regularly during the tax season through email to share updates and the monthly schedule

## **Training**

- [Link & Learn Taxes](#) is useful, but it could be challenging for new volunteers
- Hold an in-person, hands-on training for two days for new volunteers
  - Review volunteer expectations, commitment, engagement, code of conduct, etc.
- Practice sessions
  - Two staff trainers guide volunteers in a computer lab onsite so they can practice scenarios and get comfortable
- Building personal relationships through training allows for great retention, with some volunteers staying with them for over 20 years

## **Feedback**

- Conduct a survey with every client to find out things like, who has used a refund anticipation loan before and who needs assistance in other ways
- Based on the results, connect clients to other services within the agency

## **Resources**

- [Senior Community Service Employment Program](#)
- [My True Prosperity](#)
- [Practice Scenarios](#)
- [VITA/TCE Handbook for Partners and Site Coordinators](#)
- [Link & Learn Taxes](#)
- [TaxSlayer Practice Lab](#)
- [Volgistics](#)
- [Volunteer.gov](#)

## **Q&A**

- **What is the scale of the presenters' sites? How many locations, staff, volunteers, and returns prepared?**
  - The Community Action of South Mississippi is part of a coalition and has five active sites, 69 volunteers, two paid staff, and filed over 4,000 returns last year.
  - New River Community Action is also part of a coalition and has three sites of their own, two paid staff, 9 volunteers, and filed around 1,000 returns last year.

- **As a tax site coordinator, how do you manage a tax site while engaging tax filers and assisting tax preparers?**
  - HOPE SIMS: Establishing strong relationships with volunteers is key to preventing overwhelm. With the right training, your volunteers can answer any questions that clients may have. Volunteers can also help each other with questions that come up.
  - LEE ANN KENDRICK: The biggest way to be successful is to have enough volunteers. The site coordinator should be able to stay in their lane, and not have to do tax returns or quality review. While this is a luxury sometimes, it is the goal.
- **How do people feel about arranging assistant site coordinators so that there is back-up in the case of unexpected problems?**
  - LEE ANN KENDRICK: We train at least two people for each location to be site coordinators. This allows them to change positions, for example one can act as a quality reviewer if needed. It is important to have enough people trained in the higher level positions so that there's enough help when needed.
- **Who pays the SCSEP trainees?**
  - MOLLY MOULDER: Goodwill pays them to get trained. Participants are usually older people that want more training to further their career.
  - LEE ANN KENDRICK: The SCSEP program falls under the Area Agency on Aging in Mississippi and is a federal program. It is a senior corps program, that places people as receptionists and other positions. They are paid hourly minimum wage.
- **What exactly does Goodwill pay for? Is it just for the training to become a VITA volunteer, a certain amount of time, for mileage, etc.?**
  - MOLLY MOULDER: Goodwill searches for host organizations that match the interests of the trainee, for example, if they want to be an accountant. Then, Goodwill places them and pays for the training and experience. For mileage, it is left up to your organization. If the trainees are using their own vehicle, that is something you will have to get cleared as a host organization.
  - LEE ANN KENDRICK: The Area Agency on Aging does not pay for mileage, but Goodwill may be different. Check in your state who runs the Area Agency on Aging and the SCSEP program because they provide qualified, good people.
- **What is the cost for My True Prosperity?**
  - MOLLY MOULDER: The cost per volunteer during this year's tax season was \$35. If you have good volunteer retention, this pays itself off.
- **Was the \$35 paid to My True Prosperity for each volunteer their standard amount?**

- MOLLY MOULDER: Our organization has an MOU with My True Prosperity so we paid \$29 per volunteer. This rate will probably be adjusted in 2025.
- **How much training do you require for tax counselors in addition to Link & Learn?**
  - LEE ANN KENDRICK: It varies because we have volunteers with different experience levels. We start new volunteers at the basic training level (and sometimes even as greeters) to build the relationship and assess their comfort level.
- **How do you develop or train your quality reviewers?**
  - LEE ANN KENDRICK: We use materials provided by the IRS. Typically, we don't ask a volunteer to be a quality reviewer unless they've spent a couple seasons with us so that we know their comfort level doing taxes and engaging clients. We also double-check their work. Quality reviewers must be committed volunteers to become a quality reviewer.
  - MOLLY MOULDER: My True Prosperity covers all the training. We make sure to review all the information again if someone is going to be a quality reviewer to make sure they have that understanding.
- **What IRS materials do you use to train Quality Reviewers?**
  - MOLLY MOULDER: I would suggest going over [Publication 5101](#), [Publication 5838](#), [Link & Learn Taxes](#), [Form 6744](#), and getting your quality reviewer certified up to the advanced level.
- **How many volunteers did Molly make handmade gifts for?**
  - MOLLY MOULDER: I make them before the volunteer recognition event and put them in a bag that says, "Thank you." Each letter has the volunteer's name in a nice font (I trace lettering from online), stamps, a wax seal, and a personalized message inside. Finding something that is unique, different, and special for your volunteers can mean the world.
- **How do you maintain communication during the season (e.g. texting, workshops, newsletters, etc.)?**
  - LEE ANN KENDRICK: We maintain a spreadsheet of all our volunteers. Texting has been the most efficient way to communicate.
- **How do you make an account for [vita.taxslayerpro.com](http://vita.taxslayerpro.com)?**
  - MOLLY MOULDER: I contacted [Support@vita.taxslayerpro.com](mailto:Support@vita.taxslayerpro.com) to get admin credentials into the service. For the training lab, once you are on [this page](#), login using "TRAINPROWEB," and then you'll be able to create an account.

## Audience Insights

- “We have a Facebook page strictly limited to our certified volunteers for that year. It is a privacy page, so if you don’t get certified the next year, you are removed. We also do texting and emails.”
- I create a form, like a scroll, that has personalized statistics for each volunteer with their impact on the community. One time, I edited a 1040 form to say, “Can be claimed as an amazing volunteer,” and replaced the fields with things like “EITC received.” Another time, I did one on pirates, with language like, “how many villages were pillaged,” for the number of returns completed and, “how much gold was stolen,” for the overall amount of refunds. We also organize the recognition party around the theme.”
- “Last year we made a cake and put cake toppers on it of taxpayer feedback. The volunteers LOVED it! They got a yummy slice of cake and took a pic of their favorite feedback.”
- “We print survey responses from clients and post them on the walls and social media.”
- “We also created a slide show of client feedback comments. The volunteers enjoyed that.”
- “More on keeping volunteers happy – ours LOVED homemade treats. We had volunteers provide the baked goods at each clinic.”
- “I make a homemade meal each month.”