VITA 101
Putting It Into Action

Lisette Engel, MPA
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 taxpayer 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.
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.