2019 Tax Season Debrief

May 3, 2019
1-2:30pm ET; 10am-11:30am PT
Welcome

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Prosperity Now
Housekeeping

- All webinar attendees are muted to ensure sound quality. Be sure to use the dial-in number and your audio PIN.
  - To be **unmuted** and join the conversation click the “Raise Hand” icon and we will unmute you.
- **Ask a question any time** by typing the question into the text box of the GoToWebinar Control Panel.
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Want to be unmuted? Dial in by phone and enter your audio pin—then raise your hand!
Keys to Success on Today’s Webinar

- Join from a quiet space
- Grab a coffee or snack and settle in
- Engage! Share your experiences and speak with us!
- Create a watch party with your team to debrief and discuss together
Prosperity Now’s mission is to ensure everyone in our country has a clear path to financial stability, wealth and prosperity.
To **connect, strengthen** and **inspire** community tax programs so that they can ...

- More effectively & efficiently **deliver critical tax assistance**
- Couple that assistance with other **financial capability services**
- **Advocate for fairer tax policy**
Taxpayer Opportunity Network Members...

- Participate in learning and advocacy opportunities
- Learn about the latest developments in the field
- Access valuable resources for volunteers, program managers and site coordinators
- Get discounts to Prosperity Now and Taxpayer Opportunity Network events

To join or learn more, go to: prosperitynow.org/get-involved/taxpayer-opportunity-network
What’s in store for today?

- 2019 Tax Season Community Debrief
  - Interactive Format
  - Variety of Filing Season Topics
  - Share your feedback, experiences, and practices

- Close
Today’s Speakers

Rebecca Thompson
Program Director
Taxpayer Opportunity Network

Brad Martin
VITA Program Coordinator
United Way of Southwest Alabama
Welcome from TON

Rebecca Thompson
Project Director, Taxpayer Opportunity Network
Prosperity Now
Welcome from the Network Steering Committee

Brad Martin
VITA Program Coordinator
United Way of Southwest Alabama
Vice-Chair, TON Steering Committee
Today’s Topics:

- The “V” in VITA
- Shutdown Showdown
- Spend Some, Save Some
- Please Take a Number
- Let’s Get Creative
- The season is over, now what?
- Dive into the Data
- Is This Thing On?
2019 Tax Season Debrief

• Format: + / Δ / ✗
  • What worked well (+)
  • What would you like to improve (Δ)
  • What best/promising practices can you share? (✗)

• Guidelines for participation:
  • Dial-In using your telephone
  • Raise your hand
  • Input in Chat box

• Time limits: 10 minutes per topic
The “V” in VITA

Volunteer Management Practices that did (or didn’t) work.
2019 Tax Season Debrief Topics

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Poll

What challenges in volunteer retention did you experience this tax season? Check all that apply.

- People trained but didn’t certify
- Volunteers certified but didn’t volunteer
- Volunteers quit during the season
- Volunteers indicated they wouldn’t return next season
- Other? Tell us in the comments box!
The “V” in VITA

• What worked well? (+)
• What would you like to improve? (Δ)
• What best/promising practices can you share with the field? (?)
Shutdown Showdown

Western Showdown

The winner is Nancy Pelosi
2019 Tax Season Debrief Topics

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Poll

What savings or financial capability services did you offer at your tax site(s) this year? Check all that apply.

- Savings Options: Split Refund, SaveYourRefund, etc.
- Financial Coaching and/or Counseling
- Credit Reports
- Access to Banking Products
- Other? Tell us in the comments box!
Spend Some, Save Some

• What worked well? (+)
• What would you like to improve? (Δ)
• What best/promising practices can you share with the field? (?)
Spend Some, Save Some

Integrating other Financial Capability Services at tax time
2019 Tax Season Debrief Topics

• The “V” in VITA
• Spend Some, Save Some
• **Alphabet Soup:** EITC, ITIN’s, ACA
• What March Lull?
• The season is over, now what?
• Dive into the Data
• Not perfect, but better
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Poll

What effects, if any, of the EITC Refund Delay did you experience at your tax site(s)? Check all that apply.

- We served fewer EITC taxpayers than usual prior to Feb. 15th
- We served more EITC taxpayers than usual prior to Feb. 15th
- The delay had no effect on our sites or clients
- Other? Tell us in the comments box!
Alphabet Soup: EITC, ITIN’s, ACA

• What worked well? (+)
• What would you like to improve? (Δ)
• What best/promising practices can you share with the field? (🔗)
Please Take A Number

Capturing the Number of clients served through VITA
2019 Tax Season Debrief Topics

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2019 Tax Season Debrief Topics

• **The “V” in VITA**
  • Shutdown Showdown
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Poll

Did your sites experience a slow down in client traffic during the month of March?

- Yes, and we used the time to schedule appointments and follow-up with clients
- No, this was the first year
- No, and we haven’t for the last several years
What March Lull?

• What worked well? (+)
• What would you like to improve? (Δ)
• What best/promising practices can you share with the field? (🔗)
Let’s Get Creative

Implementing Creative Service Delivery Options
2019 Tax Season Debrief Topics

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Poll

Do you plan to provide any of the following services in the offseason? Check all that apply.

- Regularly-scheduled tax prep (weekly or monthly)
- Tax prep special events
- Virtual VITA or drop-off services
- Facilitated Self Assistance
- Other? Tell us in the comments box!
The season is over, now what?

• What worked well? (+)
• What would you like to improve? (Δ)
• What best/promising practices can you share with the field? (share)
Dive Into the Data

Data Collection, Demographics & Reporting
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• Not perfect, but better
Poll
What type of data do you track for your program (in addition to number of returns and refund amounts)? Check all that apply.

- Age, ethnicity, veteran status, marital status
- Banking status (banked/unbanked)
- Interest in other FinCap services
- Volunteer retention rates
- Other? Tell us in the comments box!
Dive into the Data

• What worked well? (+)

• What would you like to improve? (Δ)

• What best/promising practices can you share with the field? (🔗)
Is This Thing On?

Challenges working with the software

IS THIS THING ON OR WHAT?
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Not Perfect, but better

- What worked well? (+)
- What would you like to improve? (Δ)
- What best/promising practices can you share with the field? (🔗)
Keep The Conversation Going!

- Join the Tax Roundtable listserv
  - Search “Tax Roundtable listserv”

- Join the Taxpayer Opportunity Network to receive the latest updates from the field

- Email us with any questions, future learning suggestions, and other feedback at taxpayeropportunity@prosperitynow.org

- Coming Soon: The TON Post-Season Survey

To join or learn more, go to: prosperitynow.org/get-involved/taxpayer-opportunity-network
Thank you!