Taxpayer Opportunity Network Presents: VITA Training for You!

November 5, 2018
2-3pm ET; 11am-12:00pm PT
Welcome

Carmen Shorter
Senior Manager for Learning, Field Engagement
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.

- If you experience any technical issues, email gotomeeting@prosperitynow.org.

Trouble dialing in? Just listen through your computer with speakers or headphones!
Keys to Success on Today’s Webinar

- Join from a quiet space
- Grab a coffee or snack and settle in
- Engage! Share your comments 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?

- Welcome from Capital One
- Welcome from TON
- Building the Platform
- Practitioner Involvement and Process
- Training Demo
- Close
Today’s Speakers

Kim Allman
Senior Director of Community Development Banking
Capital One

Rebecca Thompson
Program Director
Taxpayer Opportunity Network
Today’s Speakers

Barbara DelBene
Consultant
Taxpayer Opportunity Network

Pennie Clayton
VITA Coordinator,
Community Investment
United Way of
Tarrant County

Justin Chu
Senior Program Associate,
Field Engagement
Prosperity Now
Welcome from Capital One

Kim Allman
Senior Director of Community Development
Banking
Capital One
Welcome from TON

Rebecca Thompson
Project Director, Taxpayer Opportunity Network
Prosperity Now
Special Thanks to the Volunteer Management Working Group
# Special Thanks to the Volunteer Management Working Group

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Organization</th>
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<tbody>
<tr>
<td>Amanda Hanson</td>
<td>Midwest Minnesota Community Development Corporation</td>
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<tr>
<td>Brad Martin</td>
<td>United Way of Southwest Alabama</td>
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<tr>
<td>Emily Vyhnanek</td>
<td>United Way of King County</td>
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<tr>
<td>Gwen Moore</td>
<td>Foundation Communities</td>
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<tr>
<td>Jonathan Barnes</td>
<td>Campaign for Working Families</td>
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<tr>
<td>Kelly Quicksell</td>
<td>Prepare + Prosper</td>
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<td>Pennie Clayton</td>
<td>United Way of Tarrant County</td>
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<tr>
<td>Sharon Knowles</td>
<td>We Speak Tax!</td>
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<tr>
<td>Jennifer Lambert</td>
<td>Go Ladder Up</td>
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<tr>
<td>Liz Brooks-Zak</td>
<td>Center for Economic Progress</td>
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<tr>
<td>Keith Gehring</td>
<td>United Way of Greater Cincinnati</td>
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<tr>
<td>Paj Kane</td>
<td>Jefferson Economic Development Institute</td>
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<tr>
<td>Shatomi Luster</td>
<td>University of Missouri Extension</td>
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Thanks a TON

▪ Brad Martin, United Way of Southwest Alabama
  ▪ Dear Iris

▪ Jennifer Wilson, Texas Tech University
  ▪ Class Project
TEAMWORK makes the dream WORK.
Developing the Training

Barbara DelBene
Consultant, Taxpayer Opportunity Network
Prosperity Now
Developing the Training

- Experience with VITA

- Experience with online training:
  - CEP
  - TON

- Online training is not a substitute for personal interaction
Working Group Involvement

Pennie Clayton
VITA Coordinator, Community Investment
United Way of Tarrant County
Volunteer Management Working Group

- Year-Long Project
- Monthly Meetings
- Input on Criteria
- Input on Training Modules
- Volunteers developed curriculum
- Reviewed Curriculum
Decision Criteria – Online Platform

- Embeddable (3 votes)
- Portable (2 votes)
- Video capability (3 votes)
- No separate username/password (2 votes)
- Tracking & reporting capabilities (4 votes)
- Accessible by largest # of users (3 votes)
- Budget-friendly (4 votes)
- Flexibility for content updates/changes (4 votes)
- Allows for Interactive Lessons (3 votes)
- Accessible for persons with disabilities (5 votes)
Decision Criteria - Content

- Modular (broken down by section/topic) (5 votes)
- Tax law modules for returning volunteers (4 votes)
- Modules for soft-skill development (1 vote)
- Interactive (3 votes)
- Module for trainers (0 votes)
- National perspective – focus on federal returns (not software specific) (2 votes)
- Supplemental materials & practice problems (2 votes)
Volunteer Project Demo

Justin Chu
Senior Program Associate, Field Engagement
Prosperity Now
Twelve Modules to Help You

- Intake, Interview and Quality Review
- Filing status & Dependency
- Income
- Adjustments
- Deductions
- Nonrefundable Credits
- Refundable Credits: EITC
- Education
- Affordable Care Act
- Finishing the Return
- Talking to Taxpayers
- Returning Volunteers
ALL ABOARD THE VITA-TRAIN!

Sponsored by Capital One, this training is:

- totally free
- easy to incorporate into your training
- complete with download and embed capability
- designed to get volunteers through IRS VITA Basic Certification

PROSPERITY NOW | TAXPAYER OPPORTUNITY NETWORK

@ProsperityNow
prosperitynow.org
What questions do you have?

Share them in the Questions box!
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

- Remember to vote!

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