

Virtual Training Series

Why Host a Taxathon NOW?

Center on Budget & Policy Priorities

August 30, 2018

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Prepare + Prosper

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*Louisville Asset Building
Coalition*

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The Piton Foundation



Get It Back Campaign

National effort to connect eligible workers to tax benefits

Promote the Earned Income Tax Credit, the Child Tax Credit, free tax preparation, and other tax benefits

Work with a network of diverse partners

Provide outreach tools, trainings, and resources to help you link eligible workers to the tax credits and free tax help

www.eitcoutreach.org

Virtual Training Series

Features the expertise of campaign partners in the field

Focuses on specific outreach strategies and skills that you can begin to apply to your work immediately



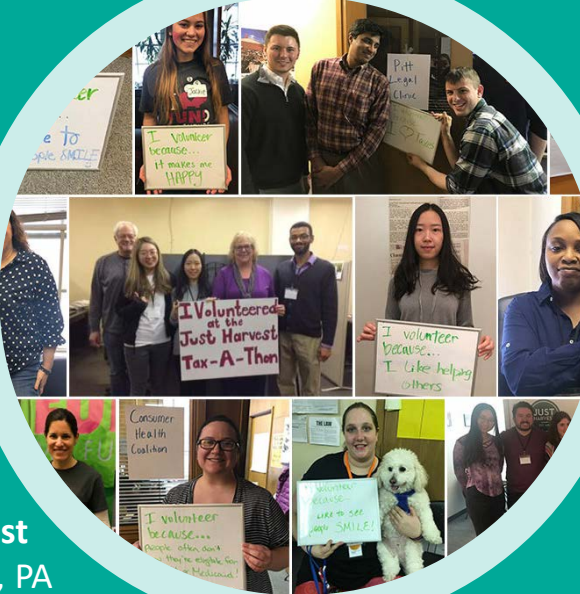
TAX + MARATHON



Tax Help
Colorado
Denver, CO



Prepare and Prosper
St. Paul, MN



Just Harvest
Pittsburgh, PA



Ladder Up
Chicago, IL



Last year's Taxathons



Louisville Asset Building Coalition
Louisville, KY

Today's Training

Goal: Help you feel supported and ready to throw a Taxathon!

- Why Host a Taxathon
- Planning a Taxathon
- Alternatives for smaller sites
- Barriers and funding options
- Messaging and working with new partners
- Resources

Taxathon Models

	Small Scale	Medium Scale	Large Scale
Number of Tax Filing Hours	4 – 8	9 – 15	16 – 24
Staff Involvement	1 – 4	5 – 10	10 or more
Volunteers	5 – 50	51 – 100	100 or more
Tax Returns Filed	30 – 100	100 – 200	200 or more
Fun Activity Ideas	Kick-off, results board, popcorn machines, superheroes, resource fair, coloring sheets, picture frames for social media, raffle, kids table, story collection, Elected Officials visits, movies, snacks for volunteers AND clients		
Other	Consider partnering with another group to help plan and promote the Taxathon		

Presenters



Andrea Kiepe
Community Relations +
Outreach Manager

Prepare + Prosper
St. Paul, MN



Brittany Sims
Program Director

Louisville Asset
Building Coalition
Louisville, KY



Kelly Wagoner
Public Information
Campaigns Manager

The Piton Foundation
Denver, CO



PREPARE + PROSPER

Andrea Kiepe

Community Relations + Outreach Manager

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PREPARE + PROSPER

taxathon!



WHO WE ARE

We work with low- to moderate-income people to build financial well-being.

- Free tax preparation, financial services, products, and coaching
- Claim it! campaign
- FAIR initiative: Products set coupled with coaching
- Policy change in areas of tax credits, asset building, and consumer protection

PREPARE + PROSPER



TAXATHON BY THE NUMBERS



95 volunteers
Helped at the taxathon



191 taxpayers
filed their taxes



Returned
\$591,833
in tax refunds

WHY HOLD A TAXATHON

- Raise awareness of free tax preparation, tax credits
- Serve more people
- Fun approach to EITC Awareness Day
- Garner media coverage
- Engage volunteers
- Celebrate our awesome work



TAX REFORM + TAXATHON

- Take advantage of media spotlight around tax issues in 2019.
- Serve more people in the busy, early season to make up for a possible late start



MEDIA COVERAGE



- Provides a fun hook, great visuals, variety of spokespersons in one spot
- We had the biggest successes with TV stations showing up during the first day
- Position as trusted source of info and tax service with uncertainty of tax reform



KEY COMPONENTS

Find the best approaches for your organization

- Celebratory kick-off
- Food and beverages
- Contests, games and guests/performers
- Activities for kids
- Social media and photos



taxathon!



WHAT WE DID

PREPARE + PROSPER

TAXATHON PLANNING

- Led by the marketing + communications team at P+P
- Held 2-3 planning meetings in January
- Our lead staff worked with others from the tax, volunteer, development, and marketing teams
- Encouraged full-time staff to help during the Taxathon



KICK-OFF EVENT



- 10 minutes before the first shift
- Invited our partners
- Held a short program
- Did a group countdown!

FOOD AND COFFEE



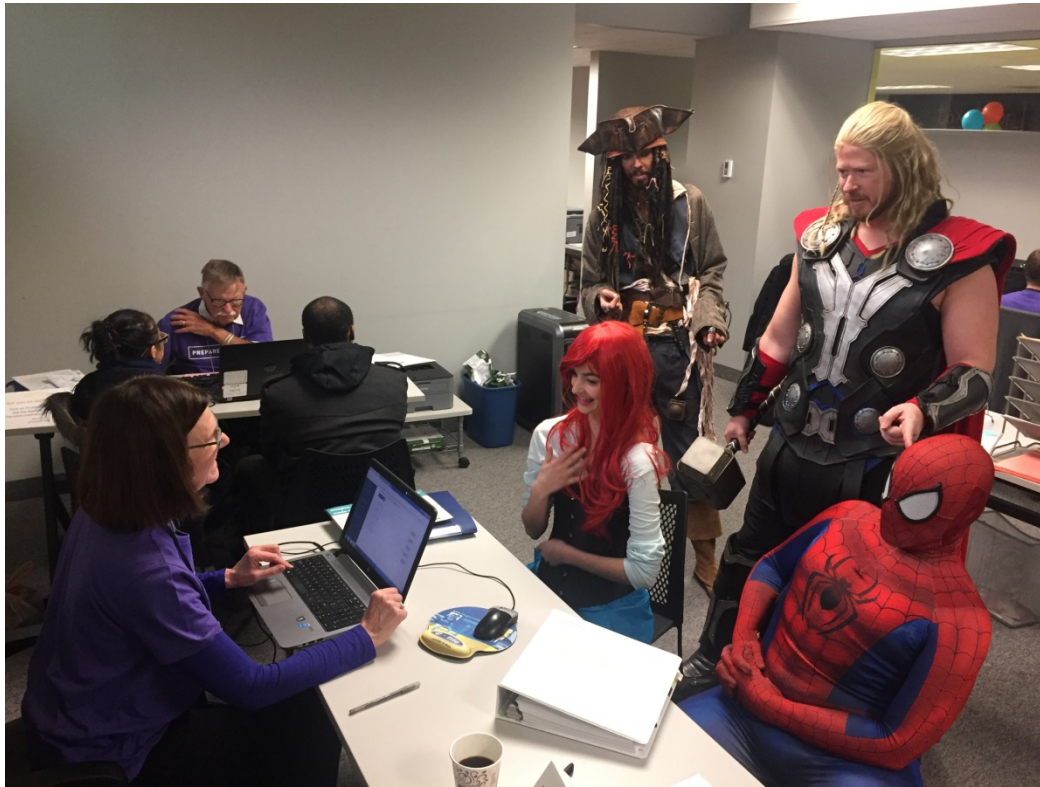
- Partners stopped by and dropped off treats throughout the event
- Fresh popcorn for customers and volunteers all day
- Fair Trade coffee throughout the event

CONTESTS, GAMES, OR PERFORMERS



- Every 25th customer received \$5 and took a picture with a volunteer or staff
- Guess the number of candy bars (Payday and 100,000 Grand, naturally)
- Held a "tax quiz" contest

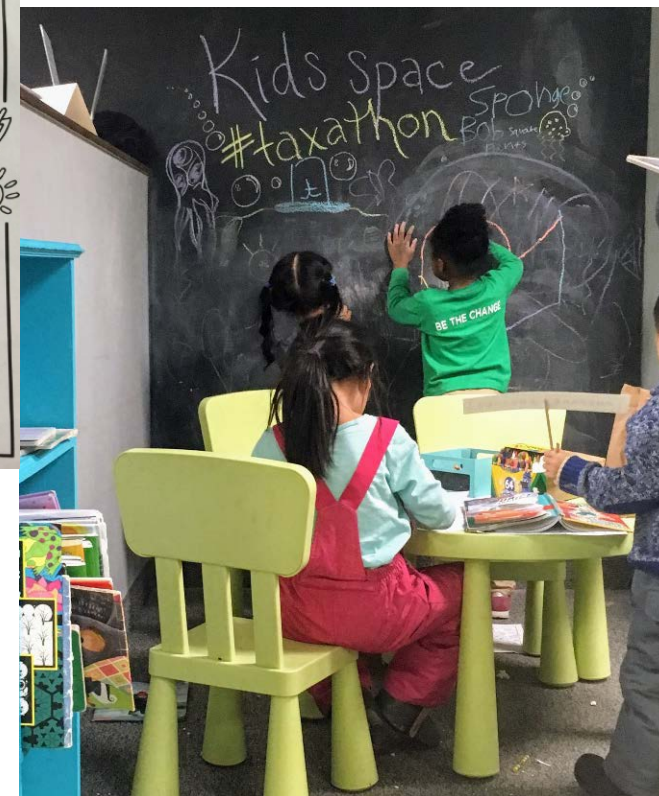
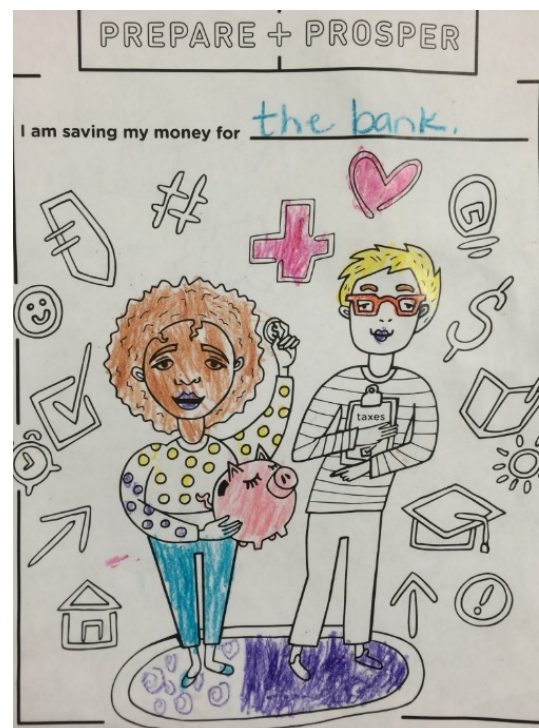
CONTESTS, GAMES, AND PERFORMERS



What ideas and resources do your staff, partners, and volunteers have to give your event an extra celebratory spark?

ACTIVITIES FOR KIDS

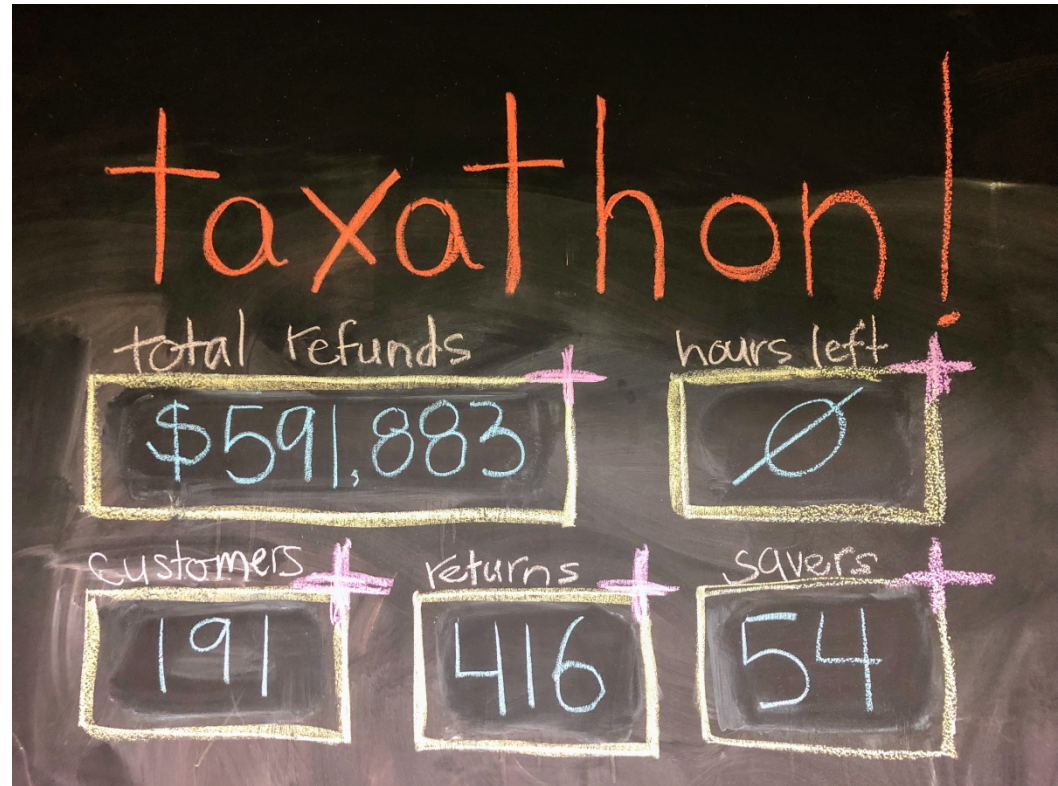
- Worked with a local designer on a coloring sheet for kids
- Hung the coloring sheets on the wall throughout the event
- Balloons for kids to take home



SOCIAL MEDIA AND PHOTOS

Tracking results:

- Updated after every shift
- Took pictures for social media
- Tracked while checking customers out



SOCIAL MEDIA AND PHOTOS



Frames:

- Used the frames to engage customers, volunteers, and partners
- Great for social media
- Great opportunity for photos of volunteers, customers, partners

SOCIAL MEDIA AND PHOTOS

Group photo:

- Involved staff, volunteers, and customers.
- Great for social media!
- Acted as the finale for the event



LESSONS LEARNED

- Make room for walk-ins who hear about the Taxathon on the news
- Be sure you provide good coverage for tracking
- Buy more give-aways than you think you'll need, kids will want to take them home
- Clearly communicate who is the event lead
- Plan extra fun activities for the regular shift



Thank you!

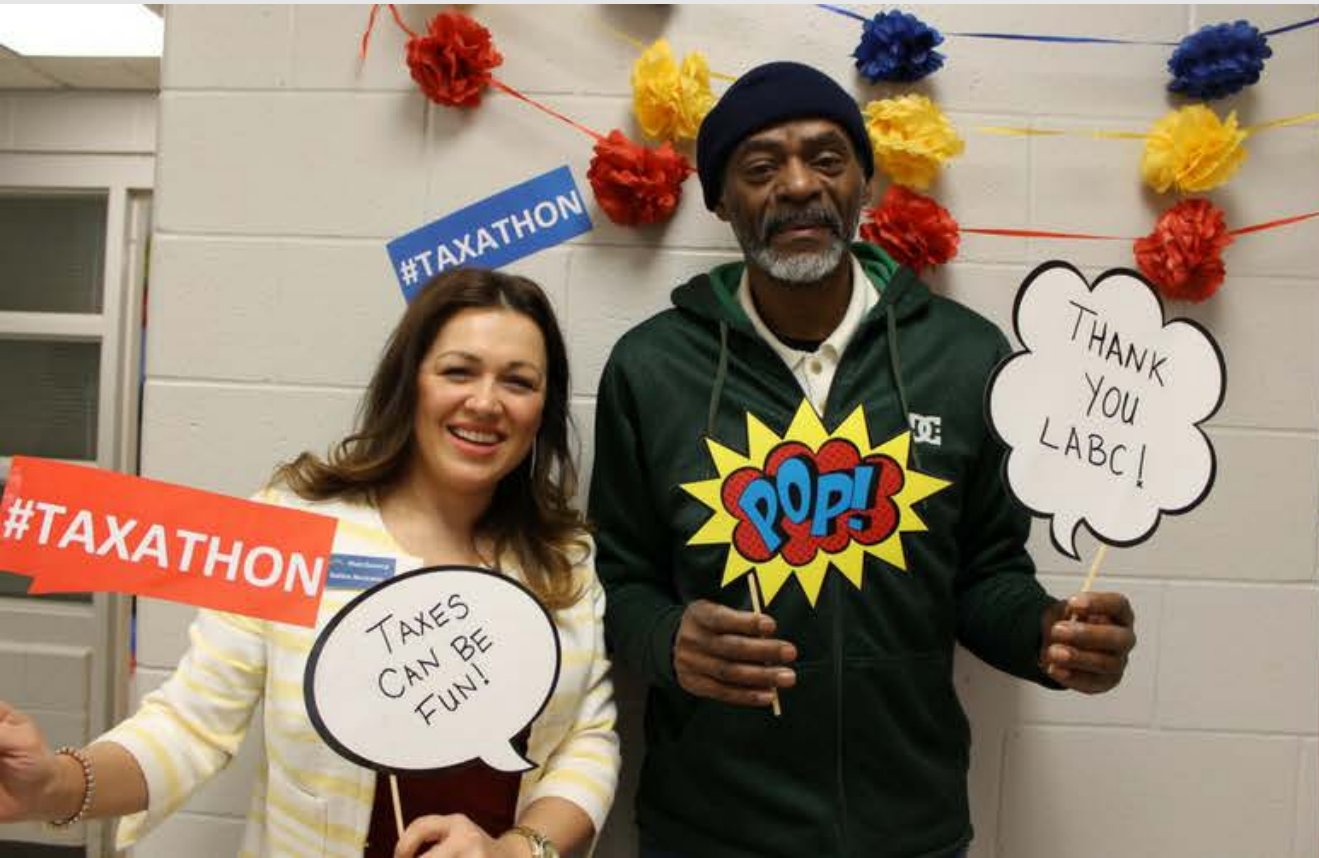




Louisville Asset Building Coalition

Taxathon Training: Alternative Considerations for Smaller Organizations

Brittany Sims, Program Director



About Us



- ❑ 501(c)(3) organization that dedicated to promoting financial stability and asset building for individuals and families
- ❑ Primary programs are free tax preparation (MTA) and Earned Income Tax Credit (EITC) Campaign
- ❑ Partners with organizations that provide a continuum of financial education resource and asset development initiatives

Why we held a Taxathon



LOUISVILLE ASSET
BUILDING COALITION
GROWING BETTER FUTURES

- ❑ Capacity to serve more EITC taxpayers
- ❑ Volunteer and board engagement
- ❑ Media attention
- ❑ Bringing together our community partners
- ❑ Inspired by last year's presenters!



Our planning approach as a small organization



- Engage our community partners and stakeholders
- Sell them on the benefits of the event
- Develop a planning committee that included representatives from these
different organizations
- Let people be creative and then take ownership of their ideas!

Funding Strategy

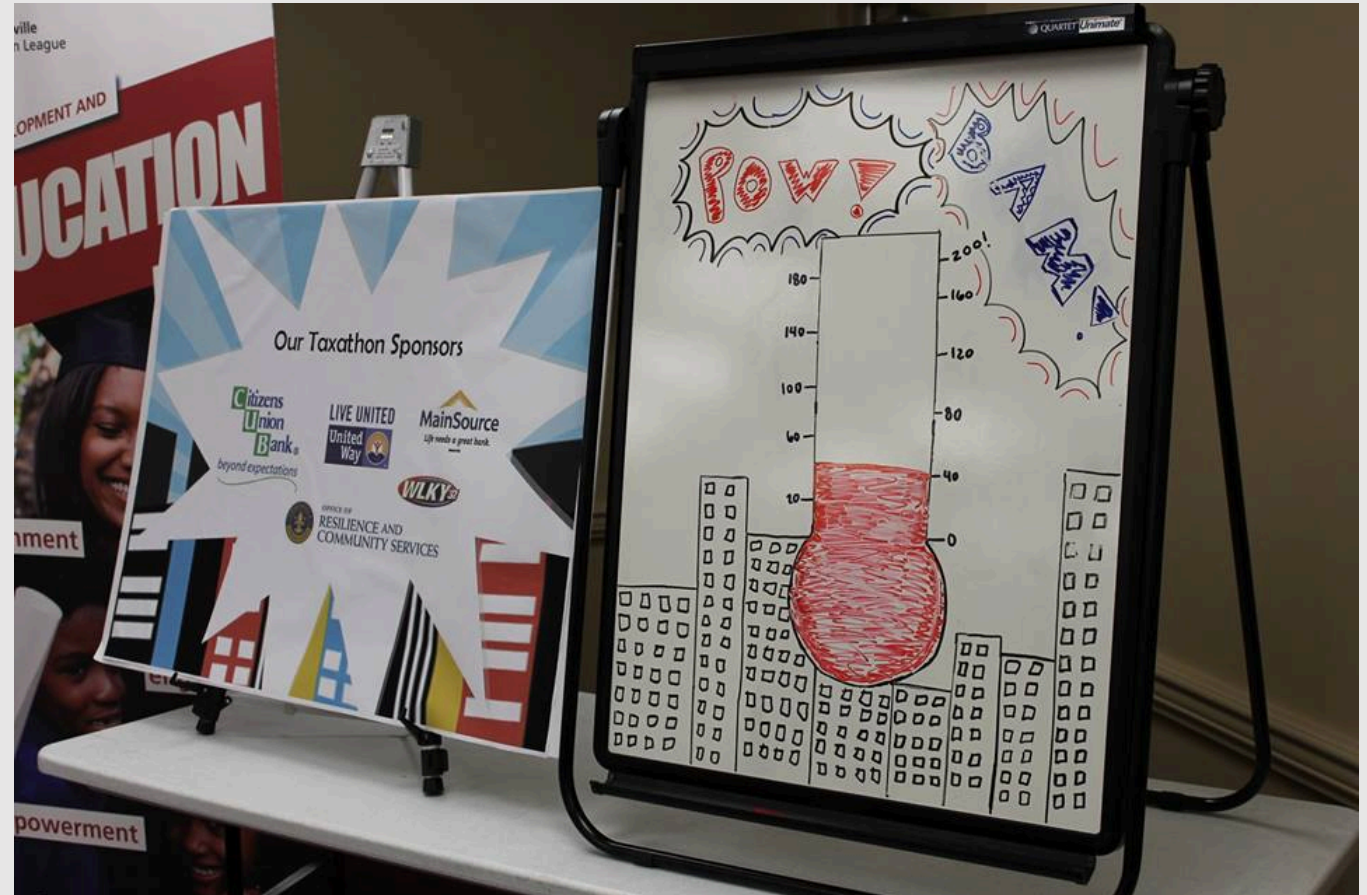
☐ Flexibility was key!

☐ Amount raised = \$750

☐ Amount spent = \$930

(not including staff)

**Also received donations



Communication Plan

- Having an outreach plan was a great learning experience for us as a small organization
- Communication Plan for 2018 included in Toolkit
- Don't be afraid to go outside of your comfort zone!
- Tried to create recognizable theme - Superhero



VITA NEWS TODAY



Our Taxathon Needs YOU!

Calling for superhero volunteers to serve as tax preparers, photographers, resource fair guides and more!

Save the Date!

Louisville Urban League

February 2nd and 3rd, 2018

Logistics



- Taxathon held at our largest site + reserved extra rooms
- Kept all other sites open
- 24 Hurs
 - 9am–1am Friday, 9am–5pm Saturday
 - Extra activities only 9am–5pm
- Sign-Up Genius



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GROWING BETTER FUTURES

How we built excitement on a budget

- Kick-off
- Results board
- Photo booth
- Community resource fair
- Popcorn machine
- Coffee
- Superhero theme
- Coloring sheets
- Storytelling
- Movies





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GROWING BETTER FUTURES

How we built excitement on a budget



Problems we want to address this year

- Appointments vs. walk-in
- Getting taxpayers to engage with the resource fair and photo booth
- Day-of social media
- Change in hours
- Combine with ETC Awareness!



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Thank you!



Utilizing a Taxathon to Develop Partnerships and Provide Additional Resources to Families

The Piton Foundation, EITC Outreach Campaign & Tax Help Colorado



- ❖ The Piton Foundation
 - Improving the lives of Colorado's low-income children and their families
- ❖ Tax Credits or Working Families Outreach Campaign
 - Over 400 partners statewide
 - 1.14 million reached with electronic and hard-copy materials
- ❖ Tax Help Colorado Program
 - 330 new students
 - 100 returning volunteers



Initial Interest and Perceived Benefits



- ❖ Serve more families during the busiest weekend of tax season



Tax prep in action!

- ❖ Better attention grabber than previous attempts to celebrate EITC Awareness Day



Senator Angela Williams visits 2018 Taxathon



Denver Mayor Michael Hancock visits 2018 Taxathon



Additional Benefits: Strengthening the VITA Community in Colorado



- ❖ Need for stronger connection between CO VITA programs
- ❖ Collaborated with Denver Asset Building Coalition (DABC)
- ❖ Led to first CO VITA summit



DABC and Piton Reps meet with Representative Leslie Herod at 2018 Taxathon



Tax Help Colorado and DABC struggling together on printer issues



Resource Fair: Opportunity to Grow Community Partnerships



- ❖ Invited organizations to participate in the resource fair
- ❖ Incentivized taxpayers to visit tables
- ❖ Demonstrated impact of free tax filing resources to partners



#TAXATHON

You could win a \$50 King Soopers Gift Card!

Visit 4 different tables in the waiting room and have them stamp this card. After obtaining 4 stamps, write your contact information on the bottom of this card and drop it in the raffle box for a chance to win a \$50 gift card! Winners will be drawn at the end of the day and contacted on Monday February 5th.

1	2	3	4

First & Last Name _____

Phone # _____

E-mail Address _____



Resource Fair: Opportunity to Provide Additional Resources



❖ Additional resources for families:

- Financial coaching
- SNAP enrollment
- Solutions to IRS issues
- Workforce support
- Plus more!



Creating a Family Friendly Environment



- ❖ Preoccupied kids at the Kid's Table
- ❖ Kept families happy with the help of snacks, coffee and water
- ❖ Scheduling appointments was a challenge



Resources to Help You Get Started



❖ Tax Help Colorado Resource Toolkit

- Resource Fair Project Overview
 - Process, Sample Emails and Outreach Tracker
- Sample Marketing Toolkit
- Sample Media Advisory

❖ Reach out with any additional questions

- Kelly Wagoner, Public Information Campaign Manager, kwagoner@garycommunity.org
- Courtney O'Reilly, Tax Help Colorado Program Manager, coreilly@garycommunity.org



Media Tips

1. **Use numbers** to pique the interest of reporters.
2. **Highlight the fun aspects** of your Taxathon to paint a picture of what reporters can capture.
3. **Make a connection to tax reform** to elevate your Taxathon's relevance and timeliness.
4. **Emphasize tax filing accuracy.**
5. **Express the impact and value of free tax preparation.**

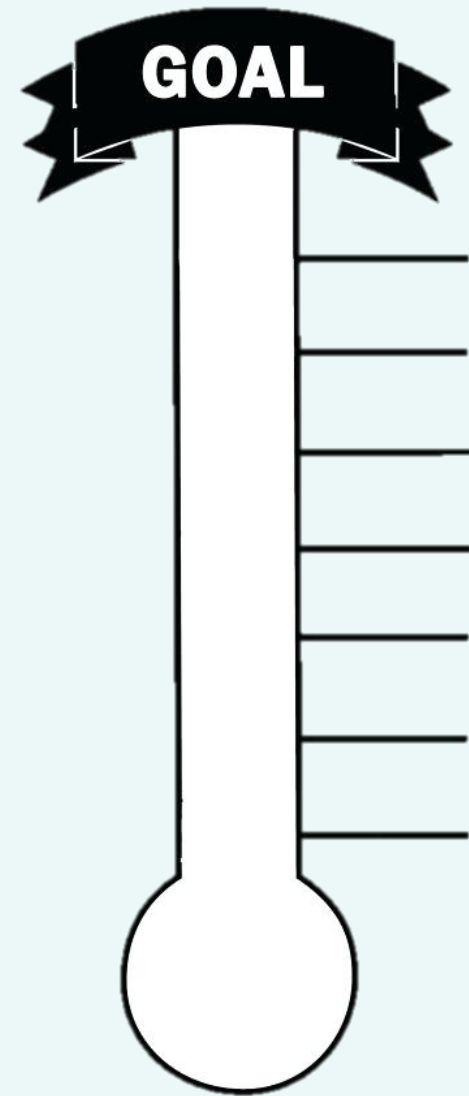
Resources

- Taxathon run-of-show and staff instructions
- Emails to volunteers and stakeholders
- Media advisory and press release
- Full media tips with examples
- Sponsor request form and letter
- Printable photobooth props

<http://www.eitcoutreach.org/blog/why-host-a-taxathon-now/>

Showcasing your work

- Results thermometer
- National media attention



Next Steps

Are you ready to host a Taxathon in 2019?

Let us know:

<https://goo.gl/forms/FOZ1jWqBqQCmAZI92>

Taxathon Planning Q&A Session

Thursday, October 4, 2018

3:00 PM ET

Save the date!

Thank You for Joining!

Stay Connected

- **Website:** www.eitcoutreach.org
- **Blog:** www.eitcoutreach.org/blog
- **Facebook:** www.facebook.com/GetItBackCampaign
- **Email:** eitcoutreach@cbpp.org

