

Virtual Training Series

Organizing a Taxathon – Why & How to Do It

Center on Budget & Policy Priorities

August 8, 2017

Courtney O'Reilly

The Piton Foundation

Taylor Putz

Prepare + Prosper

Jessica Grote

The Cooperative Ministry



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



Our Presenters

Taylor Putz



Courtney O'Reilly

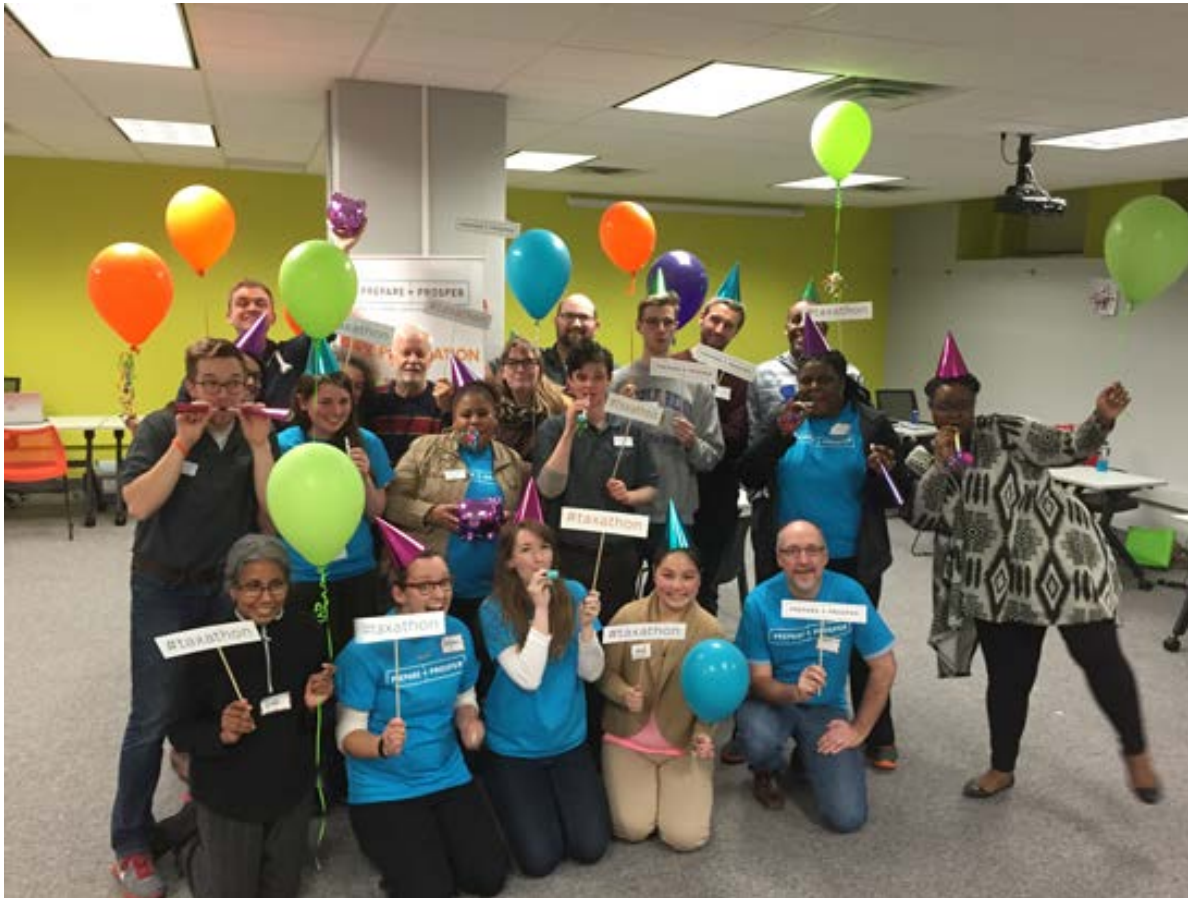


Jessica Grote



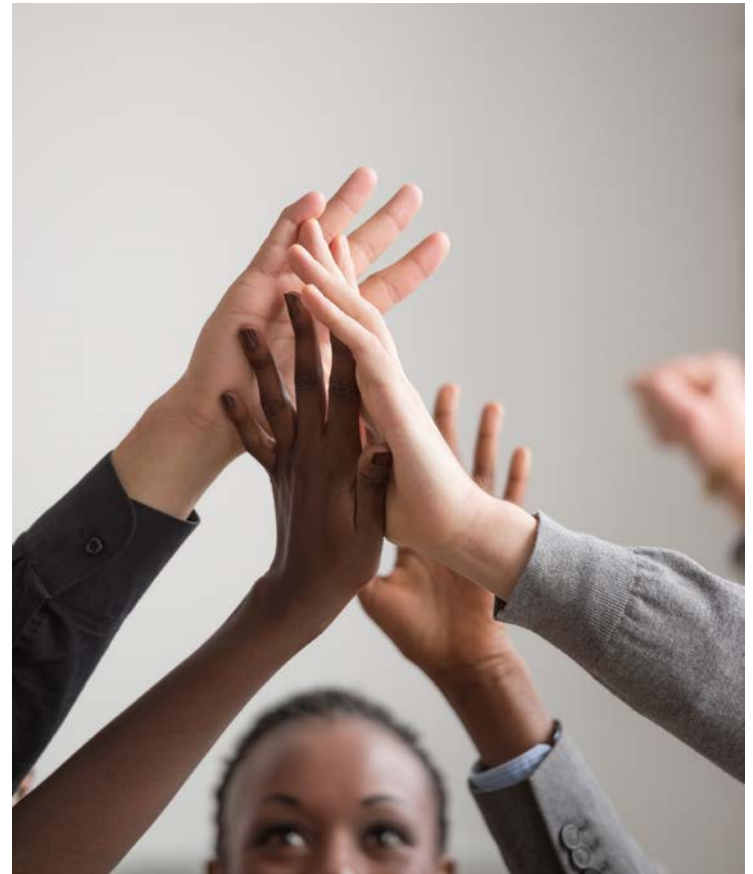
What is a Taxathon?

- A taxathon is an exciting and unique tax filing event



Why Hold a Taxathon?

- Jumpstart your outreach early in the tax season
- Attract new clients, especially those eligible for EITC
- Make tax filing more fun!



Organizing a Taxathon

- Taxathons are for free tax programs of all sizes
- Learn key elements for planning this type of celebratory event
 - Volunteers
 - Marketing
 - Media coverage





PREPARE + PROSPER

LARGE MODEL TAXATHON EXPERIENCE INSIGHTS AND LESSONS LEARNED

Taylor Putz

Community Relations + Outreach Manager
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PREPARE + PROSPER

taxathon!


WHO WE ARE

Run and promote programs and policies that foster financial health and wealth

- Free tax preparation, financial services, and financial coaching (Money Mentors)
- Claim it! campaign
- FAIR initiative (wealth-building financial product with wide distribution and scalability)
- Policy change in areas of tax credits, asset building, and consumer protection

PREPARE + PROSPER

fair:

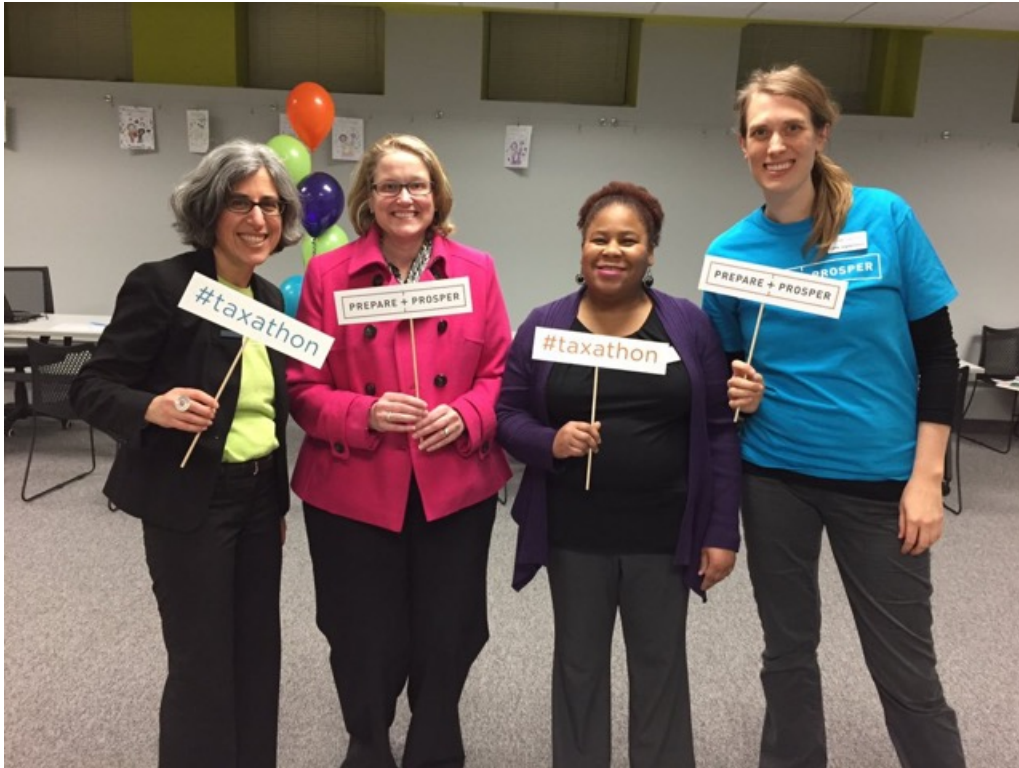


WHY WE HELD A TAXATHON

- Serve more EITC recipients
- Garner media coverage
- Engage volunteers
- Try new initiatives that embrace our brand



TAXATHON IN ONE WORD....



- Fun
- Successful
- Festive
- Energizing
- Exhausting
- Community

24 HOURS OF TAX PREP

Year One (2016)

- First weekend in February
- Appointments only
- Held at our main tax site
- **Friday** 9 a.m. – 9 p.m.
 - Normally do not do taxes on Fridays
 - Three shifts
- **Saturday** 9 a.m. until 9 p.m. (new)
 - Normally open 9 a.m. – 5 p.m. so we added one shift
 - Three shifts total



Year Two (2017)

- First weekend in February
- Appointments only
- Held at our main tax site again
- **Friday** 9 a.m. – 1 a.m.
 - Normally do not do taxes on Fridays
 - Four shifts
- **Saturday** 9 a.m. – 5 p.m.
 - Normally open 9 a.m. – 5 p.m. on Saturdays
 - No shifts were added
 - Two Shifts

TAXATHON BY THE NUMBERS



125 volunteers
Helped at the taxathon



200+ taxpayers
filed their taxes



Returned
\$700,000
in tax refunds

TAXATHON PLANNING

- Led by the marketing + communications team at P+P
- Held 2-3 planning meetings from September – January and one follow up meeting
- Planning team consisted of staff from the tax, volunteer, development, and marketing teams
- Encouraged full-time staff to help during the taxathon





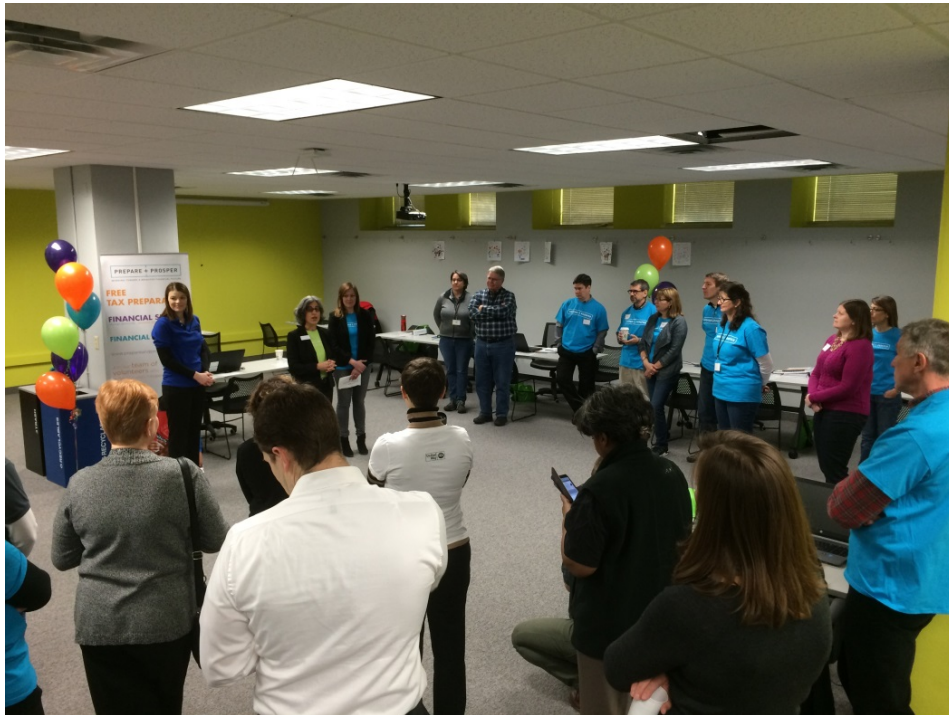
taxathon!



WHAT WE DID

PREPARE + PROSPER

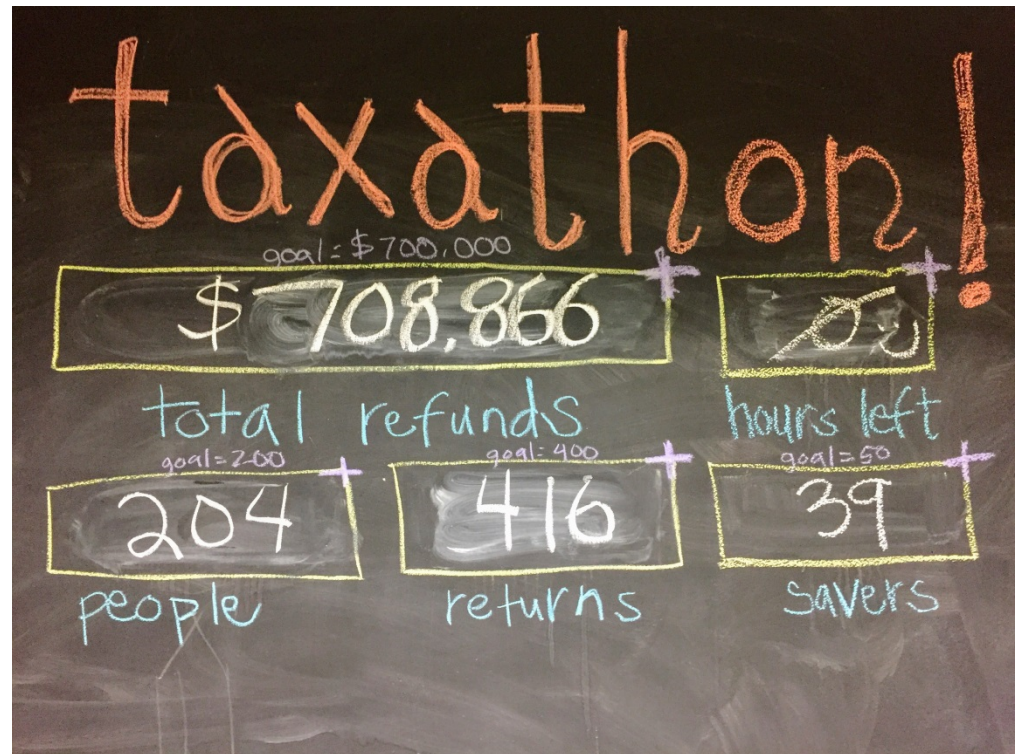
KICK-OFF EVENT



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

RESULTS BOARD

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



CONTESTS



- Every 25th customer received \$5 and took a picture with a volunteer or staff
- Customers guessed how many candy bars were in a jar while waiting for their appointment
- Held a “tax quiz” contest for volunteers at every shift

SUPERHEROES

- The planning team wanted ways to make the Saturday “regular” shift extra fun
- Superheroes joined the taxathon for 1 ½ hours



FOOD AND COFFEE



- Partners stopped by and dropped off treats throughout the event
- There was popcorn for customers and volunteers
- Fair trade coffee throughout the event

MEDIA



- We had the biggest successes with TV stations showing up during the first day
- Launch of tax season coverage with a fun spin

PICTURE FRAMES

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



“IT FELT LIKE A PARTY!”



- Purchased lots of balloons and other party favors
- Volunteers wore the same t-shirts

FINAL PICTURE

- Took a group picture at the end of the taxathon
- Involved staff, volunteers, and customers
- Great for social media!



LESSONS LEARNED

- Make room for walk-ins who hear about the taxathon on the news
- Improve the “tally sheet” process for tracking refunds etc.
- Buy more balloons, especially for kids who want to take them home
- Clearly communicate who the “go-to” person is for the event
- Intentionally plan extra activities for the normally scheduled shift





Thank you!





Denver's First Taxathon: Medium Model Experience

Courtney O'Reilly, Program Manager - Tax Help Colorado

About The Piton Foundation & Tax Help Colorado

- The Piton Foundation: Improving the lives of Colorado's low-income children and their families
- Tax Credits for Working Families Outreach Campaign begins in 1989
- Tax Help Colorado Program
 - Adapted from Tax Help New Mexico
 - Utilizing College and High School Students



Why a Taxathon?



- The Challenge with EITC Awareness Day
- Prepare + Prosper Inspired and Amazed
- Create Newsworthy Content with a Kick-Off Event
- Opportunity to Offer Additional Services
- Strengthen Relationships with Partnering Organizations
- Help More Families File Early!



**THE PITON
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at Gary Community
Investments

www.garycommunity.org

Denver Taxathon Model

- 12 Hour Taxathon
- Denver Asset Building Coalition
- No Speaking Engagement



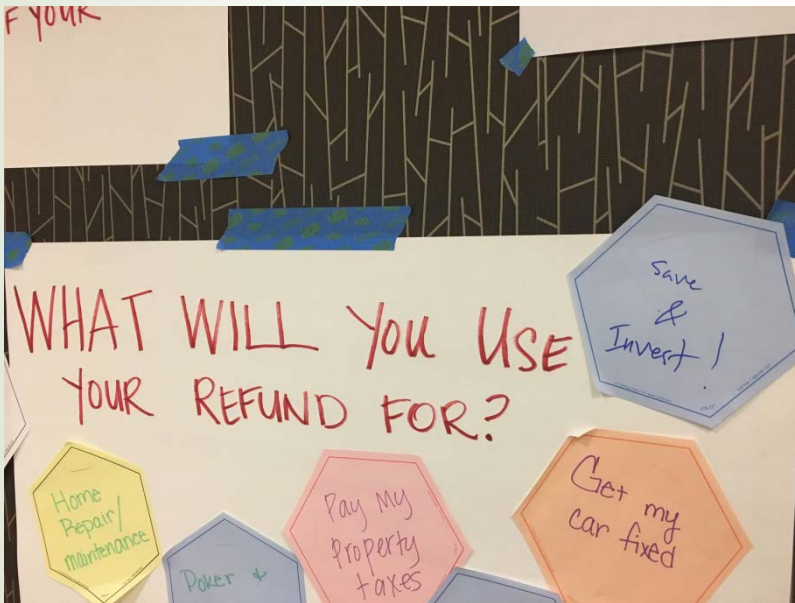
- Partner Engagement
- Resource Fair for Taxpayers



Denver Taxathon Model Continued



- Kids Table
- First come, first served
- All three tax models available



- Story Collection
- Volunteer Experience



Denver Taxathon 2017 Results



- 350 volunteer hours
- Filed nearly 100 returns, \$189,000 in federal refunds
- 2 Elected Officials Visits



Denver Taxathon 2017 Results



- 9 Partnering Organizations
 - Colorado VITA Coalition
- Social media:
 - 178 Posts
 - 50 Users
 - 44K Reach
 - 163,409 Impressions
- Earned Media
 - Denver 7 News Interview



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Lessons Learned and Advice for Beginners



- Changes for Denver Taxathon 2018
 - Kick-off planning date in September
 - Increase Taxathon promotion
 - Schedule appointments
 - Training for partner organizations
 - Better engagement at the site

- Advice for Others
 - Prioritize what is most important to you
 - Identify team roles early
 - Include other volunteers not currently associated with VITA
 - Reach out to other VITA Taxathon enthusiasts



SMALL MODEL TAXATHON EXPERIENCE

**THE
COOPERATIVE
MINISTRY**

JESSICA GROTE

DIRECTOR OF FINANCIAL SUSTAINABILITY

VITA AT THE COOPERATIVE MINISTRY

- **18 VITA sites spread across 8 counties**
- **165 Volunteers**
- **Over 7600 Tax Returns in 2017**





“SUPER SATURDAY”



WHY HOLD A FREE TAX FILING EVENT?



**Media
Coverage**

**Support
New
Volunteers**

**February
Rush**

HOW TO HOLD A FREE TAX FILING EVENT, FOR FREE

Use your connections

- **Location**
- **Volunteers**
- **Community Partner Booths**
- **Music and décor**
- **Food**

LESSONS LEARNED & TOP TIPS



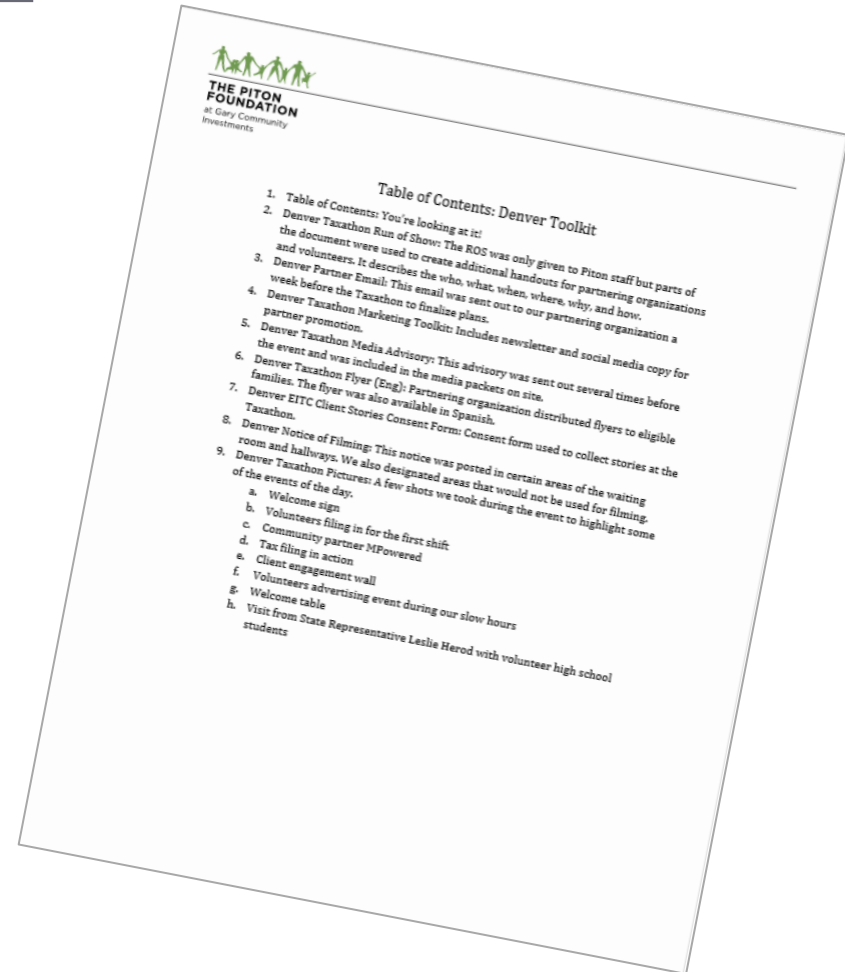
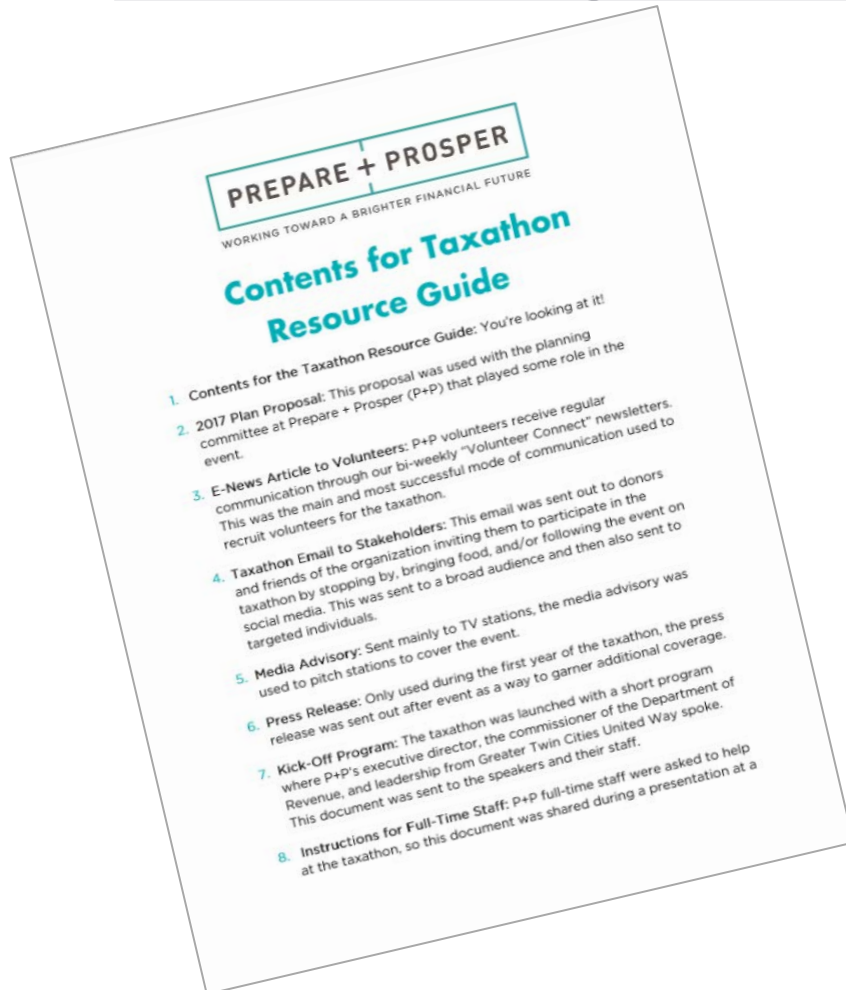
- Start interview station early
- Flow the traffic
- Identify a go-to advanced preparer
- Use relationships, don't create them
- Save the date early
- Take photos

Contact Information

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- **Courtney O'Reilly – The Piton Foundation**
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Get Started Organizing Your Own Taxathon

Taxathon Planning Resources



- Download: <http://bit.ly/taxathon-resources>

Follow-up Taxathon Planning Session

Taxathon Planning Support Session

Date: Thursday, September 14, 2017

Time: 3:00 – 4:00 PM ET/ 2:00 – 3:00 CT

Purpose:

- Talk through your ideas with people who have hosted successful taxathons
- Get feedback on your draft materials
- Connect with others who commit to hold a taxathon in 2018

Email eitcoutreach@cbpp.org if you're interested in joining the planning support session and weren't able to attend the webinar.

Thank You for Joining!

Stay Connected

- Website: www.eitcoutreach.org
- Blog: www.eitcoutreach.org/blog
- Facebook: www.facebook.com/getitbackcampaign
- Tax Credit Outreach News: <http://eepurl.com/bo6ra5>
- Email: eitcoutreach@cbpp.org

