

VITA Host Site Facility Needs

About the Program

The Volunteer Income Tax Assistance (VITA) program is operated by the IRS and is managed locally by United Way of Lee, Hendry, and Glades, and United Way of Charlotte County in partnership with local organizations and agencies. The IRS provides guidance, quality standards and sets volunteer certification requirements, United Way recruits and trains volunteers, and operates **NO-COST** tax assistance programs for low- and moderate-income taxpayers with incomes under \$66,000.

- The program typically runs from late January through April 18th, with several sites staying open year-round to assist late filers, those needing amendments, or help understanding letters they received from the IRS.

If you are interested in hosting a VITA site for the upcoming tax season, please review the following information.

Volunteer Dependent/Driven

The operation of the program depends on volunteers and we are somewhat constrained in when the services can be offered by the availability of volunteers.

Space Needed to Operate Tax Preparation:

- **Handicapped accessibility:** The space should be wheelchair accessible (and ADA compliant).
- **Availability to the general public:** this means that clients cannot be turned away due to race, religion, age, marital status, gender, sexual orientation, disability, etc.,
- **Adequate parking:** there needs to be enough parking to accommodate the additional volume presented by clients and the tax preparers themselves.
- **Restroom facilities:** For the clients and volunteers because everyone's got to go sometime.
- **The volunteer income tax assistance program needs space** for the following activities and reasonable working space that affords clients some **sense of privacy**. The space can take the form of a single large working room with multiple tables/zones reasonably spaced, or multiple rooms with clients meeting in each. The different activities include:
 - Greeting (sign clients in and give them required intake form to complete)
 - Waiting area for clients (chairs with/without tables)
 - Tax preparation

This could consist of several different configurations:

- o **Computer Lab.** The client(s) sit with the volunteer tax preparers, so each workspace needs room to seat at least 3 people. We also need sufficient physical distance between each of the computers being used so that conversations between the preparer and client(s) can be kept private from other clients.
- o **Tables and chairs.** Ideally, enough space for 5--10 preparer clients pairs (3 chairs minimum per station). Please note—the size and set-up of every tax site is

different. [If we know in advance, we may be able to provide tables and chairs, but would need to be able to store them in your space.]

- o **Cubicles/Offices.**
- Review/Exit station (1 table and 3 chairs). To assemble paperwork and have a final discussion with the client to ensure they understand next steps (which refunds are expected, which payments need to be made, if any returns need to be mailed in because they are not eligible for electronic filing, etc.)
- **Technology (internet, computers, printers, copier)**
 - o **Access to high speed internet connection**
 - Secure connection to internet not available to the general public (if using WIFI-must be strong password protected)
 - o **Does HOST site have computers we can use?**
 - If a computer lab (or office computers) are being considered:
 - Would we be able to print to an existing laser printer (we can provide toner and paper), or do we need to bring our own printer?
 - If we need to bring our own printer, how will we be able to connect the printer to the network or to a designated printing computer?
 - **If HOST site does not have computers we can use,** VITA can bring in laptops/printer but will need a locked, limited access storage area to store the laptops and printer. VITA can provide a locking file cabinet if needed.
 - **Access to copier/printers.** We can supply paper for your machine, or we can provide our own printer/copier if needed.
 - **Access to a shredder,** if possible.

Additional Needs

- Area to store program supplies. (Forms, envelopes, copy paper, signs, etc.)
- Ability for VITA Office staff to drop off supplies and access our computer equipment to resolve technology during weekdays is desired.

Managing Client Foot Traffic: We recognize that expanding services at your location is a double-edged sword: offering more services increases your value to your community, enhances your reputation, and improves the quality of life for nearby residents; all of which help you reach the potential you envision for your facility. But it does increase foot traffic into your facility, and that can require managing your limited resources. We are very happy to work with you to strike the right balance.

By offering **appointment-only tax preparation**, client traffic is generally well managed, with a small waiting area for clients that arrive early or while they complete their initial paperwork, and any burden on parking or other resources is predictable for you. Typically appointments are arranged hourly, with the number of concurrent appointments based on the number of volunteers available. For example, a site that is open from 9:00-Noon, and

has four volunteers each day. The Coordinator might plan on three appointments per hour, helping nine people each day. Because of the nature of tax preparation, the ratio of volunteers to concurrent returns is almost never 1:1. And, occasionally, some returns may be a little more complicated and take a little longer than an hour while most returns take less.

As a Host site, do you have:

A leader. A person at the location that is willing to take on the responsibility of running the site. This person does not need to be a tax expert or familiar with the program as United Way will provide assistance and training to help. It is good to note, the more invested the person is in the program, the more successful the program will become.

Appointment takers: VITA sites are run by ***appointment only*** which are scheduled in our appointment software. By requiring appointments, we can control the number of clients coming into a site, and ensure we have enough help on hand. Will the host site have someone available to help schedule their client appointments into the software?

A volunteer pool. United Way will provide the training, materials, and knowledge necessary to become certified as a tax preparer, but a potential program will thrive quicker if the organization has access to a potential pool of volunteers interested in learning about taxes. The pool does not have to necessarily be large as there are program models that will work with as few as two committed volunteers.

For questions, please do not hesitate to contact:

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