Northern Virginia CASH Coalition

Fairfax County Department of Family Services (DFS) has been the Program Coordinator for the Northern Virginia CASH (Creating Assets, Savings, and Hope) Coalition for the past seven years. CASH specifically targets low-income individuals and families through the operation of 22 VITA sites and three volunteer facilitated self-assistance sites throughout the region (Fairfax, Loudoun, Prince William, and Fauquier Counties) with significant increases in demand and output each year. TY 2005: 729 Federal returns prepared; TY 2006: 1,020 Federal returns prepared; TY 2007: 2,423 Federal returns prepared; TY 2008: 3,280 Federal refunds prepared; TY 2009: 3,703 Federal refunds prepared; TY 2010: 4,317; and TY 2011: 4,691 Federal returns prepared. While some sites were unable to continue with the Coalition for TY 2011, DFS was able to network with additional community organizations to keep the number of sites at 22, also helping us to mean our tax preparation goals. Please refer to SF-PPR-A for additional performance outcomes.

TY 2011 was extremely successful for the Northern Virginia CASH Coalition, especially in the area of outreach and publicity. A strategic outreach plan enabling us to reach our goal was developed to provide information to those most in need, which included those eligible for the EITC and other tax credits, and promoted electronic filing options. To that end, we increased our outreach to both volunteers and the community (please see complete list included as Attachment 1). In addition to greater numbers of outreach (including posters, flyers, bookmarks, mailers, and the use of our website), we used alternative methods to reach members of the community through our established channels, such as free standing banners, promotional t-shirts, water bottles, umbrellas, radio interviews and social media. At the 7th Annual Mega Job Fair and Entrepreneurship Expo volunteers passed out VITA materials, an event that attracts approximately 2,500 job seekers each year Volunteer and staff also wore a variety of t-shirts throughout the tax season, including a green tie-dyed one which said “Volunteer Income Tax Assistance” on the front, and “Do You Qualify? Free Tax Preparation” on the back. The Expo program booklet also included two pages of materials promoting VITA
services. TD Bank, a major partner with VITA, greeted event attendees and reminded them of the importance of filing their taxes and the opportunity to open a free checking account.

As the numbers of returns have increased, our e-file rejection rate has actually decreased. TY 2007: 13% rejection rate; TY 2008: 11% rejection rate; TY’s 2009 and 2010: 8% rejection rate; and TY 2011: 6% rejection rate. To increase our capacity to e-file, 40 laptops and wireless printers have been added to the coalition sites since TY 2009. NOVA Coalition sites performed e-file returns in all possible circumstances. Paper processing was limited to only those rare instances that were inappropriate for e-file.

The decreased rejection rate was also result of an increased focus on quality assurance measures throughout the tax season. Support staff visited sites weekly to complete the IRS Site Review Checklist; most deficiencies were discussed and remedied with the Site Coordinator before leaving. No significant deviations were reported to Campaign Central for TY 2011. Special attention was given to the possibility that sites were retaining too much customer information; training emphasized that the online system files the information electronically.

DFS provided guidance to VITA sites prior to the start of the VITA campaign, including performance through reviews, audits, and reports, documenting and tracking major program milestones and provided work performance measurement to the IRS. DFS provides weekly work performance reports to VITA sites and members of the NOVA Coalition via our website, www.nvacash.org. Training of volunteers and site coordinators emphasized the need to protect the identity and confidentiality of the customers and all volunteers were required to submit a signed Volunteer Standards of Conduct certificate. Three lead staff members were responsible for conducting site reviews, establishing relationships with site coordinators and volunteers, and providing ongoing support to all sites. During TY 2011, additional procedures were implemented to enhance accuracy of returns. Site coordinators were provided with practice tax return scenarios which, at their discretion, they could require each volunteer to complete prior to preparing returns for tax clients. This gave both the site coordinator as well as the tax preparer more confidence in the accuracy of the return. Sites have made more use
of peer quality reviews, which lessened the stress of having just one quality reviewer. Site e-filers were also encouraged to review each return before filing. Three general categories for the Northern Virginia VITA site hosts were libraries, local government, and community based organizations. Libraries and government sites offered secure filing space for personal records, and community based sites followed their respective organizational policies or were provided with a cabinet and lock by the coalition, to secure documents.

The volunteer training was enhanced this past year by the standardization of the Processed Based teaching module developed by two trainers. All volunteer trainers were encouraged to use the module, attend a train-the-trainer session and were given copies of the training power-point and hand-outs, prior to the start of new volunteer training. In addition, returning volunteers were invited to a three hour, hands-on computer TaxWise Online training, using the Link and Learn practice lab in order to review their skills. Training was focused around providing the highest quality tax preparation services, both for accuracy and customer service. Sites adhered to the 10 Quality Site Requirements established by the IRS, and these requirements were constantly reinforced during volunteer and coalition meetings, as well as by the site coordinators during orientations. Once returns were completed, the volunteer Quality Reviewer was responsible for ensuring that an accurate return had been produced and that excellent customer service had been delivered.

During TY 2010 and TY 2011 the NOVA Coalition added a Volunteer Orientation to the Volunteer Training Plan to discuss expectations and increase volunteer retention. The plan also consisted of the following four training sessions: IRS Process Based Training for New and Returning Tax Preparers; TaxWise Online Training for New and Returning Volunteers; Train-the-Trainer Sessions; and Site Coordinator Training. Classroom training was a major component of the training schedule and has become more professional over the past three years. The result has been an increase in volunteer retention. During TY 2011 the numbers of volunteers decreased slightly but the quality of volunteers improved, largely due the mandatory Volunteer Orientation. Included in each training session was a description of the Purpose, Scope, Objectives, Training Requirements, Roles and Responsibilities, Training Tools and Techniques, Schedule, Curriculum, Training
Environment, Training Materials, and Training Evaluation Feedback and Analysis. The estimated training hours per volunteer were as follows:

**New Volunteers – Tax Preparers:** 6 hours for IRS Process-Based Training and 3 hours for TaxWise Online Training; **New Volunteers – Screeners:** 2 hours of Process-Based Training; **Returning Volunteers:** 2 hours for IRS Process-Based Training and 1 hour for TaxWise Online Update; **Site Coordinators:** 3 hours for Site Coordinator Roles and Responsibilities, Updates on Tax Laws and a TaxWise Online refresher; and **Trainers:** 3 hours for updates on tax laws and classroom training to provide each trainer with a comprehensive lesson plan to train new and returning volunteers.

The training delivery methods included multiple approaches based on the variety of adult learning styles: Process-Based Training, Online Training, Classroom and Computer Based Training are some of the delivery methods that volunteers can choose from.

The qualifications of instructors were critical to achieving the goals of the program and to provide high quality returns. Instructors’ backgrounds were closely considered, and selected instructors included experts from the IRS, SCOPE’s Office, tax attorneys, Certified Public Accountants (CPAs), and volunteers with electronic filing and TaxWise Online experience. In order to be an instructor, the individual had to be certified at an Advanced level.

Several key strategies were employed to recruit and retain volunteers. First, established volunteers from the existing coalition were engaged and received training as soon as the TY 2011 guidelines became available. Once again, a volunteer survey was disseminated to keep volunteers engaged during the summer months and allow them an opportunity to provide feedback (included as Attachment 3). Second, the NOVA CASH Coalition mobilized our outside faith and community-based partners to conduct unprecedented outreach to members of the community. One of our key partners in volunteer recruitment and retention was Volunteer Fairfax, a local non-profit agency which has connected members of the community with volunteer opportunities for over 30 years. This group was instrumental in the successful recruitment of volunteers at program inception,
and in TYs 2008 and 2009 they provided additional services including the in-kind contribution of training through a “Volunteer Bootcamp” curriculum.

The Northern Virginia CASH Coalition volunteers were honored at several public recognition events, including the Site Coordinators Breakfast, VITA Kickoff, the EITC Awareness Day event, and the Volunteer Recognition Luncheon, held on June 15, 2012. This event welcomed over 300 volunteers and family members to a lunch catered by Wegmans, with live music and remarks from the Chairman of the Fairfax County Board of Supervisors, Congressman Gerry Connolly and IRS SPEC Territory Manager Chris Neighbor. The IRS also presented Milestone Recognition Awards to three VITA volunteers. All volunteers received a NOVA CASH umbrella and the IRS Volunteer Appreciation certificate. Site Coordinators received framed Certificates of Appreciation.

The IRS administration of the VITA Grant Program is a great benefit to our local program. SPEC, both the personnel assigned to our area and the Atlanta office, keeps us informed about changes in IRS policies and procedures and provides opportunity for discussion and input. The volunteer online training materials are excellent and the Form and Publications team prepares materials that are clear and helpful. The Northern Virginia CASH Coalition has just a couple suggestions for TY 2012:

- In order to provide consistent information and be respectful of volunteer Site Coordinators’ time, we suggest that Site Coordinator training be delivered through an IRS-SPEC webinar that can be viewed by all Site Coordinators around the country at their convenience.
- Since the TCE Program and the VITA Grant Program have similar needs for recruiting volunteers and clients, more sharing of information between the two programs might be helpful.