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Volunteer Income Tax Assistance (VITA)

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Autumn Warren & Austin Skogsberg
ACCT 585-VITA- Kathy Hurley



Site Operations:

- Every Wednesday we set aside 4 hours as a group to set up a productive room for both self-assisted and one-on-one tax returns.
- Interviewed clients to get the information we needed from their life to successfully complete their return and e-file for them.
- We were able to share knowledge with our community and in turn received stories that really stuck with us.
- Transformed a very intimidating experience into a simple and stress free afternoon for some of our clients.



Community Partners:

- Internal Revenue Service (IRS)
- Boise Public Library!
- Boise Public Schools (Garfield Elementary and Frank Church High School)
- NeighborWorks
- The refugee community
- The elderly
- College student and others...

Preparation:

Going into a tax season you never know what kinds of questions and issues will arise. Here is what we did to prepare:

- Advanced Certification from the IRS
- Specialty exams (HSA, Military, Foreign Student, International)
- Practice exams for application of concepts and program

Reflection:

Helped the local community file tax returns for 2017 and prior years. We turned this often intimidating event into a pleasant experience.

By offering a no cost service we are able to reach out and help many people who truly need assistance, and we provide them with the confidence that their tax return was prepared accurately.

We expanded our knowledge of individual income tax situations by helping low - income individuals file and solve any problems that arose.

We are able to interact with and learn about people's lives through this personalized experience. We learn from their life experiences as we get to know them while they receive a beneficial service from us.

The bottom-line is everyone's situation is different and every tax return is unique.

Results:

Number of Volunteers: 19
Number of Returns Prepared: 379
Average per Session: 41
Average Refund: \$636 (VITA only)
Average EITC: \$232 (VITA only)

Our Observations:

- We are a life line for our clients.
- The more we talk to our clients the better we understand their tax situation.
- Clients genuinely appreciate the time we take to help them, and they also want to know as much about our schooling as possible.
- It is a rewarding way to get involved in the community and help people we wouldn't have had the opportunity to interact with otherwise.