



**Working with Volunteer Income Tax Assistance
(VITA) Sites
Guide for Child Care Centers and Family Day
Care Homes**



Working with Volunteer Income Tax Assistance (VITA) Sites Guide for Child Care Centers and Family Day Care Homes

Each year, many of the families served by local child care centers and family day care homes, and the staff that work for those providers, look forward to the time when they can file their tax returns and get their refunds. Many families, especially those with children, can be entitled to sizable refunds from the Child and Dependent Care Tax Credit, the Child Tax Credit, and the Earned Income Tax Credit (EITC). The maximum EITC for the 2012 tax year is almost \$6000 if a taxpayer has three or more children.



Many taxpayers are in a hurry to file their tax returns so they can access their refunds and therefore use a paid tax preparer to complete their returns. They may also pay extra to access those funds quickly through a Refund Anticipation Check (RAC). Lower-income families pay an average of \$160 to have their tax returns prepared and can pay additional fees for a RAC.¹ Families can save the money they would otherwise spend on these fees by filing their taxes at a Volunteer Income Tax Assistance (VITA) site.

What is a VITA Site?

VITA sites generally offer free tax help to people who make \$50,000 or less and need assistance in preparing their own tax returns. IRS-certified volunteers provide free basic income tax return preparation to qualified individuals in local communities. VITA sites are generally located at community and neighborhood centers, libraries, schools, shopping malls, and other convenient locations. Most locations also offer free electronic filing.

In addition to providing the filing for free, VITA sites provide other benefits for tax filers. VITA sites often partner with financial institutions, giving filers the opportunity have their refund deposited into a bank account. Electronic deposits into bank accounts provide access to the refunds usually within a week to ten days. VITA sites are frequently run by nonprofits that offer other services that could be beneficial to the tax filer, such as savings bonds, Individual Development Accounts, credit counseling, and financial education.

Example of an Early Childhood/VITA Partnership - Community Action Project of Tulsa County

Community Action Project of Tulsa County (CAP) is a non-profit, anti-poverty agency whose mission is to help low-income families with young children achieve economic self-sufficiency. CAP reaches more than 20,000 households annually through an array of programs including early childhood education coupled with family supports, promotion of the Earned Income Tax Credit, eligibility screening for public benefits, first-time homebuyer assistance, occupational training, adult basic education, health services, affordable rental housing, and college scholarship application assistance.

¹ <https://tax-coalition.org/policy-resources/consumer-protections> (Accessed October 26, 2012)

CAP's Early Childhood Program operates year-round and enrolls about 2300 children ages six weeks through four-years-old at 13 early childhood education centers located across three school districts. CAP also offers home-based services such as Parents As Teachers.

CAP has operated VITA sites in the Tulsa community for the past 18 years. Over the years, CAP has located many of the tax preparation sites inside child care centers so that parents had easy access to the free tax service. When not possible, they find other nearby locations.

To promote the VITA sites, CAP has provided marketing materials such as t-shirts to the early childhood staff. The shirts promote the VITA site locations and serve as a reminder to teachers and other staff members to talk to the parents about the opportunity. Banners promoting the tax sites are placed at all CAP child care sites each tax season. CAP also sends mailers to all enrolled families that include a phone number to call for an appointment. Families enrolled at CAP's child care centers receive priority access for a tax preparation appointment and have a full two weeks lead time to call in and schedule before the appointment line is opened to the general public.

In What Ways Can a Child Care Center or Family Day Care Home Partner With a VITA Site?

The example above is just one of a range of ways that child care providers can partner with VITA sites. It all depends on how involved the provider wants and has the time and resources to be. The following are some examples that follow a continuum from the least to the most time and effort.

There are abundant and limitless opportunities to promote VITA in your community, many at little or no cost. But, whether you plan to start big or small, early planning and collaboration is the key to success.

Promote a VITA Site Operated by Another Organization – Probably the easiest thing an early childhood provider can do is to promote an existing VITA site's services to its parents and employees. This may be the best model for a family day care home. The following steps will help to facilitate such a partnership:

Identify the VITA site(s) in your community and the contact information for those site(s). You can search for individual sites by zip code on the IRS website at <http://irs.treasury.gov/freetaxprep/>. You can also find lists of IRS contacts and VITA Coalitions by state in Appendices A and B at the end of this document.

Contact a VITA site in your community to discuss ways that you can work together. Most sites will welcome the opportunity to identify new clients.

Obtain information from the VITA site on hours of operation, eligibility, and how an individual can make an appointment.

Obtain existing marketing materials from the VITA site and/or work with them to develop marketing materials. Materials are readily available online at <http://www.eitc.irs.gov/ptoolkit/main/>.

Promote the site to parents and staff before the holidays and before they have gone to a paid preparer. Most VITA sites begin operations by the third or fourth week in January.

When you promote the program to parents and staff, encourage them to use their refund both for immediate needs but also for paying down debt or saving.

Work with a VITA Site to Host Tax Preparation at Your Location. The next step in terms of level of effort by a child care provider is to host a VITA site to come and provide tax preparation at your location. This could be done once or a few times during the tax season. The following steps will help guide you:

Identify the VITA site(s) in your community and the contact information for those site(s).

Contact a VITA site in your community to discuss their interest in providing tax preparation at your location.

Talk with the VITA Site about what you need on site to help them with their work. You may need a greeter to meet people as they arrive for their appointments and ask them to begin filling out paperwork.

The tax preparers may need access to a copier, a computer with Internet access, or Internet access for a computer they bring with them.

Obtain existing marketing materials from the VITA site and/or work with them to develop marketing materials. Materials are readily available online at <http://www.eitc.irs.gov/ptoolkit/main/>.

Promote the hours that the service will be provided at your site to staff and parents and do so before the holidays and before they have gone to a paid preparer.

When you promote the program to parents and staff, encourage them to use their refund both for immediate needs but also for paying down debt or saving.

Work with a VITA Site (Partner) Located in Another Community to Provide Tax Filing Over the Phone or Via Skype. If you are located in a rural community, there may not be a VITA site near your center. A relatively new option offered by the IRS is to work with a VITA site (partner) in another community to provide tax filing via the phone or Skype. The tax preparer would be sitting in front of a computer in one town, and the taxpayer would be sitting in front of a computer in another town. The tax preparer would “see” the taxpayer and work with him or her to complete the return.

The following steps can help in the development of such a partnership:

Reach out to the IRS contacts or VITA coalitions in your state that are listed in appendices A and B to find out which VITA sites (partners) might be open to working with you. It is important to work with a VITA site located in your geographic area of the state because the tax preparers at the site will also be trained on your state’s tax law.

Contact one or more VITA sites (partners) and discuss options for working together.

Talk with the VITA site (partner) about what you need on site at your location to help them with their work.

You may need a greeter to meet people as they arrive for their appointments and ask them to begin filling out paperwork.

You will need access to a telephone and a computer with Internet access and a video camera, if you plan to use Skype.

Obtain existing marketing materials from the VITA site and/or work with them to develop marketing materials. Materials are readily available online at <http://www.etc.irs.gov/ptoolkit/main/>.

Promote the hours that the service will be provided at your site to staff and parents and do so before the holidays and before they have gone to a paid preparer.

When you promote the program to parents and staff, encourage them to use their refund both for immediate needs but also for paying down debt or saving.

Work with a VITA Site that is Part of Your Larger Organization. This is the model used by the Community Action Project of Tulsa County described above. This type of partnership may work best for child care centers that operate within community action agencies or other larger organizations such as colleges and universities that provide an array of services to adults in the community. The following steps will help you get started:

If you do not already know, find out if the organization within which you are housed operates a VITA site.

Contact the VITA program coordinator to discuss ways that you can work together.

Obtain information on hours of operation, eligibility, and how an individual can make an appointment.

Obtain existing marketing materials from the VITA site and/or work with them to develop marketing materials. Materials are readily available online at <http://www.etc.irs.gov/ptoolkit/main/>.

Promote the site to parents and staff and do so before the holidays and before they have gone to a paid preparer.

When you promote the program to parents and staff, encourage them to use their refund both for immediate needs but also for paying down debt or saving.

Start Your Own VITA Site. This is the most ambitious and labor-intensive option, but could be a good fit for an early childhood program serving many families and with access to volunteers in the community who would want to work as tax preparers. Perhaps your center is located in a college or university town or near a retirement community. The following are a few key steps to get you started:

Contact the IRS relationship manager who serves your state or part of the state and let him or her know of your intentions right away. He or she will most likely come and meet with you and walk you through what you need to get started.

Take a look at some of the resources that already exist to help organizations think through the steps needed to start a VITA site.

A resource local to the region is “How to Start a VITA Site in Your Community: Bringing More Dollars Into the Local Economy While Supporting Families,” a publication of the IRS, RAISE Texas, and United Ways of Texas. The document can found online at <http://raisetexas.org/resources/VITA%20How-To%20Toolkit.pdf>.

The National Community Tax Coalition has a page on its website that has information about managing a VITA Site - <https://tax-coalition.org/program-tools/managing-a-tax-site>

Begin the process of launching a VITA site at least a year prior to when you hope to offer the services. Among other things, it takes time to recruit and train volunteers, make sure you have all the necessary computer equipment and Internet connections, and develop marketing materials.

More [information about partnering opportunities](#) involving the VITA program can be found on the IRS website. The [IRS Partner Outreach Corner](#) offers electronic communication materials to use in reaching out to the people you serve. Get free news you can use each month, targeted by time of year to coincide with what your customers, employees, volunteers, etc. need to know about new tax law legislation, IRS events, and other activities that affect them. You can use these items on your websites, in electronic products, publications, etc. as needed.

Appendix A - IRS Contacts

Arkansas

SheLisa DuBois
Shelisa.T.Dubois@irs.gov
501-396-5752

Debbie Huizenga
Deborah.A.Huizenga@irs.gov
501-396-5831

Theresa Ward
Teresa.L.Ward@irs.gov
501-396-5966

Louisiana

Baton Rouge
Diane Denton
Lynda.d.denton@irs.gov
225-923-4210

Central Louisiana
Randy Johnson
Randolph.f.johnson@irs.gov
225-923-4245

Lafayette and Lake Charles
Willie Ann Jones
Willie.a.jones@irs.gov
504-558-3323

Northeast Louisiana
Michael Brown
Michael.f.brown@irs.gov
318-683-6312

Northshore Area
Diane Puderer
Diane.puderer@irs.gov
504-558-3006

Northwest Louisiana
Patricia James
Patricia.james@irs.gov
318-683-6334

Southeast Louisiana and New Orleans
Frances Becker
Frances.becker@irs.gov
504-558-3216

New Mexico

Elizabeth Perea
elizabeth.l.perea@irs.gov
505-837-5539

John Wheeler
john.k.wheeler@irs.gov
505-837-5566

Oklahoma

Dena Baker
Dena.a.baker@irs.gov
405-297-4024

Shelly Breden
Rochelle.A.Breden@irs.gov
405-297-4058

Pam Charles
Pam.k.charles@irs.gov
405-297-4054

Linda Evans
Linda.l.evans@irs.gov
405-297-4010

Walkidia Gomez
Walkidia.a.gomez@irs.gov
405-297-4150

Texas

Northern Texas
Paul Ramos
214-413-6029

Southern Texas
Ricardo Soto
Ricardo.soto@irs.gov
915-834-6510

Appendix B - Local EITC Coalitions

Arkansas

Little Rock

City of Little Rock Coalition
W.J. Monagle
Arkansas Workforce Center
WJ.Monagle@arkansas.gov

Lowell

Northwest Arkansas Creating Financial
Stability Coalition
Holly Sparks-Hill
United Way of Northwest Arkansas
hsparks@unitedwaynwa.org
479-845-6017

Pine Bluff

Pine Bluff Wealth Building Coalition
Reverend Jesse Turner
pbicvr@aol.com
870-536-7274

Louisiana

Baton Rouge

Capital Area Asset Building Coalition
Joy Banks
Capital Area United Way
jbanks@cauw.org
225-346-5804

Lafayette

Acadiana Asset Building Coalition
Anthony James
United Way of Acadiana
anthony.james@unitedwayofacadiana.org
337-706-1202

Lake Charles

Southwest Louisiana Asset Building
Coalition
Michelle McInnis
United Way of SWLA
mmcinnis@unitedwayswla.org
337-433-1088

Monroe

Acquiring Assets, Building Hope, Creating
a Better Life Coalition of North East
Louisiana
Michelle Saucer-McGuire
United Way of Northeast Louisiana
msaucer@uwnela.org
318-325-3869

New Orleans

Asset Building Coalition of Southeast
Louisiana
Odessa Adams-Payne
United Way of Southeast Louisiana
OdessaA@unitedwaysela.org
504-827-6822

Ponchatoula

Northshore Regional Asset Building
Coalition
Eula Dickson
HELP LA
eula@celebrationfellowshipchurch.org
985-386-3004

Shreveport

Northwest Louisiana Asset Building
Coalition
Judy Cantil
United Way Northwest Louisiana
judy@unitedwaynla.org
318-677-2504 ext. 25

New Mexico

Albuquerque

Tax Help New Mexico
Ann Lyn Hall
Central New Mexico Community College
ahall@cnm.edu
505-224-4311

Oklahoma

Durant

Big Five Coalition
Donna Pound
dpound@bigfive.org

Jay

Northeast Oklahoma Community Action
Agency Coalition
Jean Cooper
jcooper@neocaa.org
918-253-4683

Tulsa

Community Action Project of Tulsa
County
Steven Dow
sdow@captc.org
918-382-3217

Texas

Abilene

West Central Texas Center for Economic
Opportunity
Dixie Bassett
United Way of Abilene
dixie@unitedwayabilene.org
325-677-1841

Terry Johnson
New Seed Initiative
tjohnson@newseedinitiative.org
325-672-6715

Angleton

Brazoria County Asset Building Coalition
Gloria Luna
United Way Of Brazoria County
sdow@captc.org

Arlington

Arlington Assets for Working Families
Sandra Kinloch
United Way Tarrant County
Sandra.Kinloch@unitedwaytarrant.org
817-548-9595

Austin

Foundation Communities-Community Tax
Centers
Alpha Balde
alpha.balde@foundcom.org
512-610-7375

Beaumont

Lamar University Collaborative
Elton Payne, Jr
Lamar University

Brownsville

Cameron County Economic Opportunities
Coalition
Wendy Hanson
United Way of Southern Cameron County
wendy.hanson@unitedwayrgv.org
956-548-6880

Corpus Christi

Asset Building Coalition of Corpus Christi
Donna Hurley
United Way
361-882-2529

Crystal City

Zavala County VITA
Gloria Hernandez
gloria7123@sbcglobal.net
830-374-7123

Carrizo Springs

Dimmit County VITA
Nancy Gonzalez
nancy.gonzalez@mrgdc.org
(830) 876-3533

Dallas

Earn It! Keep It! \$ave It!
Gala Trigg
Family Financial Centers Community
gtrigg@unitedwaydallas.org
214-978-2069

Neighborly Outreach Works, Inc
Yolanda Gills
214-337-5000

Southeast Dallas Coalition
Dr. Shirley King
Project Safe Neighborhood
Swking1978@aol.com
214-489-9300

Del Rio

Del Rio Family Economic Success
Coalition
Angelo Gonzalez
bengelo11@yahoo.com

Denton

Financial Stability Partnership of Denton
County
Leah Jordan
United Way of Denton County

Eagle Pass

Maverick County VITA
Jose Faz
jose.faz@mrgdc.org
830-773-1191

El Paso

Larry Garcia
El Paso Affordable Housing Credit Union
Service Organization
epaffordablehousing@sbcglobal.net
915-838-9608

Houston

Neighborhood Tax Centers
Elizabeth Colvin
Neighborhood Centers Inc.
ecolvin@neighborhood-centers.org
713-669-5313

VN TeamWork

Michael Nguyen
hiepluc@vnteamwork.org
281-495-8936

Laredo

Laredo Family Economic Success
Coalition
Rogelio Trevino
WorkSource Solutions
rogelio.trevino@twc.state.tx.us
956-722-3973

Lubbock

Coalition of Community Assistance
Volunteers, Inc.
Steve Anderson
Shari Flynn
LHFC@lubbockhousing.com
806-687-2228

Lufkin

Deep East Texas Rural Initiative
Nancy Bledsoe
Goodwill Industries of Central East Texas
nancy.bledsoe@lufkingoodwill.org
936-632-8838

McAllen

Family Asset Building Task Force
Luisa Saenz
Children's Defense Fund
lsaenz@childrensdefense.org
956-687-5437

Midland

Midland Asset Building Coalition
Alfredo Chaparro
Midland College Business & Economic
Development Center
achaparro@midland.edu
432-684-4215

Odessa

Permian Basin VITA Coalition
Jill Miller
Odessa Affordable Housing
jtmiller@nwol.net
432-362-2349

Round Rock

Williamson County Financial Stability
Coalition
Mark Adams
United Way Williamson County
mdadams3@verizon.net

LeAnn Powers, CPO
United Way Williamson County
leann@unitedway-wc.org

San Antonio

Alamo City Coalition for Economic Self-Sufficiency (ACCESS)
Richard Keith
City of San Antonio, Dept. of Community Initiatives
Richard.Keith@sanantonio.gov
210-207-8221

Spring

Solution for Communities - Children's Books on Wheels (CBOW)
Rita Wiltz
rw2619@msn.com
281-844-7596

Temple

Central Texas VITA Coalition (formerly Temple Community Coalition)
Jerry Wickwire
Goodwill Learning Center
254-289-4619

Uvalde

Uvalde VITA Coalition
Barry Zimmerman
WorkForce Center
barry.zimmerman@mrgdc.org

Waco

Asset Building Coalition
Roy Nash
NeighborWorks
roynash@nw-waco.org
54-752-1647 ext. 208

Wichita Falls

Wichita Falls Community Asset Building Coalition
Lana Winfrey
NTA United Way
lwinfrey@ntauw.org
940-322-8638

Zapata

Zapata County VITA Coalition
Audelia Hernandez
County of Zapata
audehernandez@hotmail.com
956-765-9920

Note: Angela Duran and Wanda DeBruler developed this document for the Region VI Administration for Children and Families Office of Child Care. November 2, 2012.

The authors would like to thank the IRS SPEC teams for their assistance.