



## Why Host a Taxathon NOW?

### *Training Reference Guide*

*Presented by the Center on Budget and Policy Priorities' Get It Back Campaign*

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#### **Training Goal**

- Help community partners feel supported and ready to host a Taxathon

## What is a Taxathon?

- A Taxathon (tax + marathon) is a fun tax filing event organized at the beginning of tax season that allows you to:
  - Establish your tax site as a community resource
  - File a lot of tax returns early in the tax season
  - Celebrate staff and volunteers
  
- Taxathon Models

	Small Scale	Medium Scale	Large Scale
<b>Number of Tax Filing Hours</b>	4 – 8	9 – 15	16 – 24
<b>Staff Involvement</b>	1 – 4	5 – 10	10 or more
<b>Volunteers</b>	5 – 50	51 – 100	100 or more
<b>Tax Returns Filed</b>	30 – 100	100 – 200	200 or more
<b>Fun Activity Ideas</b>	Kick-off, results board, popcorn machines, superheroes, resource fair, coloring sheets, picture frames for social media, raffle, kids table, story collection, Elected Officials visits, movies, snacks for volunteers AND clients		
<b>Other</b>	Consider partnering with another group to help plan and promote the Taxathon		

## Taxathons for Larger Organizations

*[Prepare + Prosper \(P+P\)](#) runs and promotes programs that foster financial health and wealth for low- and moderate-income people in Minnesota. It has 8 different VITA sites and serves 13,000 taxpayers each year. P+P has successfully organized Taxathons yearly since 2015.*

- Why a Taxathon?
  - Serve more people at the beginning of tax season
  - Raise awareness of free tax preparation and tax credits
  - Garner media coverage
  - Fun approach to EITC Awareness Day
  - Promote fun and trustworthy organizational image
  - Engage volunteers
  
- Tax reform provides new awareness opportunity for 2019
  - The media and public will have a heightened awareness about taxes
  - The IRS may start tax season later to complete preparations to implement tax reform, creating a greater need for VITA services to help more people early

- Media coverage
  - Party atmosphere provides good media visuals
  - Establish organization as trusted info source, especially on tax reform, which will be beneficial throughout the year
  
- Key components of a Taxathon for P+Ps
  - Planning: 2-3 meetings in January with staff across different teams
  - Kick-off event: donors and partners made appearances; held group countdown to rally volunteers
  - Food and coffee: community partners donated food and drink for volunteers and fresh popcorn for customers—contributes to party atmosphere and gives incentive to stay for other financial services
  - Contests, games, and performers: \$5 gift card for every 25<sup>th</sup> customer, guessing number of candy bars game, and tax quiz. Can engage volunteers not interested in tax filing to dress up in costumes, do magic tricks, etc.
  - Activities for kids: Toy and book area for kids, coloring sheets, and balloons
  - Social media and photos: Extra effort to track data accurately through the day. Running tally builds positive sense of urgency and accomplishment. Used large picture frames and signs for photo ops. Group photo finale provides event closure.
  
- Lessons learned
  - Leave room in schedule for walk-ins
  - Devote plenty of staff resources for tracking results
  - Have plenty of stock if giving away freebies
  - Include fun extras, but don't let it get too chaotic
  - Communicate who the lead contact is for the event

## **Taxathons for Smaller Sites**

*[Louisville Asset Building Coalition](#) promotes financial stability and asset building, primarily through VITA and EITC campaigns. LABC partners with other organizations to provide other financial education and asset development resources.*

- Why a Taxathon?
  - Serve more EITC taxpayers who look for a refund at the beginning of the season
  - Engage volunteers and board members in new ways
  - Bring positive media attention, improve branding
  - Bring together and connect community partners in new ways
  - Inspired by other organizations that hosted Taxathons
  
- Planning process
  - Engage community partners and stakeholders early; get backing from them before starting full event planning

- Sell community partners and stakeholders on benefits of a Taxathon—show results from other organizations
- Develop a planning committee that includes representation from different organizations
- Let people be creative and take ownership of their ideas
- Funding strategy
  - Flexibility is key in case of funding loss—cut unnecessary costs, pursue other funding avenues
  - Partnered with an organization that connects nonprofits to fin institutions to seek out sponsorship; also received donations from board and staff
  - Raised \$750 and spent \$930
- Communication plan
  - Don't be afraid of going outside of your comfort zone—big name local news livestreamed the kick-off event on request
  - Create recognizable theme—used superhero theme
- Logistics
  - Taxathon at largest VITA site, reserved extra rooms—break room for volunteers
  - Kept all other sites open—some volunteers came from these site after hours to help with the Taxathon
  - 24 hours of tax filing
    - 9 am-1 am Friday, 9 am- 5 pm Saturday
    - Extra activities to build excitement only 9-5
    - Planning to do 9 am to 9 pm next time
  - Used Sign-up Genius for volunteer coordination
- Building excitement on a budget
  - Kick-off with news station and local councilwomen
  - Results board—tracking returns
  - Photo booth—Party City kit helped create props
  - Community resource fair—suggest including local taxpayer advocate, if have one
  - Coffee and popcorn machine
  - Coloring sheets
  - Storytelling sheet (in toolkit)—board members having first experience at VITA site spoke with taxpayers to collect stories
  - Playing movies in waiting area
- Problems to address
  - Appointments vs walk-ins—promo brings lot of walk-ins. Determine desired flow
  - Lack of taxpayer engage at resource fair—will try bingo card to win small prize
  - No staff assigned for day-of social media
  - Combine event with more EITC awareness

## Utilizing a Taxathon to Develop Partnerships and Provide Additional Resources to Families

*[The Piton Foundation](#) works to improve the lives of Colorado low-income children and their families. The Piton Foundation runs a tax credit outreach campaign with over 400 community partners and the Tax Help Colorado VITA program with 430 student volunteers. Piton has hosted two Taxathons.*

- Why a Taxathon?
  - Excite media and local public officials about the EITC—mayor and senator visited
  - Raise awareness of other tax sites
  - Strengthen VITA community statewide
    - Collaborated with Denver Building Coalition
    - Hosted a VITA summit following the success of the Taxathon
- Resource fair
  - Created a “Passport” to encourage taxpayers to visit different community tables to be entered in a raffle to win a \$50 gift card
  - Expanded relationship with community partners. Need commitment from partners to ensure participation during entire event
    - Financial coaching
    - SNAP enrollment
    - Solutions to IRS issues
    - Workforce support
- Family-friendly environment
  - Kids’ table to keep kids busy; balloons are popular
  - Lots of snacks and drinks
  - Used appointment scheduling app—lots of walk-ins at beginning
- Resources to get started (in toolkit)
  - Resource fair project overview
  - Sample marketing toolkit
  - Sample media advisory
- Story collection/media
  - Signs saying photos would be taken of taxpayers
  - Signed release for those with more in-depth stories
  - People are happier to tell stories at beginning, waiting too long makes them less inclined to share stories
  - Want to start including video next year
  - \$10 Starbucks gift card as incentive

## Media tips

- Use numbers to pique interest of reporters
- Highlight fun aspects of your Taxathon
- Make a connection to tax reform
- Emphasize tax filing accuracy
- Express impact of free tax preparation

## Taxathon resources

Include toolkits with:

- Taxathon run-of-show and staff instructions
- Emails to volunteers and stakeholders
- Media advisory and press release
- Full media tips with examples
- Sponsor request form and letter
- Printable photobooth props
- Find all resources at [www.eitcoutreach.org/blog/why-host-a-taxathon-now/](http://www.eitcoutreach.org/blog/why-host-a-taxathon-now/)

## Showcasing Your Work

- The Get It Back campaign will track results from individual Taxathons on one big results thermometer
- Will work on resources for a national media strategy closer to tax season
- If you are interested in hosting a Taxathon, [please fill out this form](#) so we can support you and share resources with you

## Questions

- Are there liabilities that come with allowing children onsite?
  - Sims: The Urban League designates all events as child-friendly or not child-friendly; our Taxathon is child-friendly. Local government partners urged training and certification to have a separate child area, so children just stuck with parents the whole time to avoid liability.