

# PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

## Contents for Taxathon Resource Guide

1. **Contents for the Taxathon Resource Guide:** You're looking at it!
2. **2017 Plan Proposal:** This proposal was used with the planning committee at Prepare + Prosper (P+P) that played some role in the event.
3. **E-News Article to Volunteers:** P+P volunteers receive regular communication through our bi-weekly "Volunteer Connect" newsletters. This was the main and most successful mode of communication used to recruit volunteers for the taxathon.
4. **Taxathon Email to Stakeholders:** This email was sent out to donors and friends of the organization inviting them to participate in the taxathon by stopping by, bringing food, and/or following the event on social media. This was sent to a broad audience and then also sent to targeted individuals.
5. **Media Advisory:** Sent mainly to TV stations, the media advisory was used to pitch stations to cover the event.
6. **Press Release:** Only used during the first year of the taxathon, the press release was sent out after event as a way to garner additional coverage.
7. **Kick-Off Program:** The taxathon was launched with a short program where P+P's executive director, the commissioner of the Department of Revenue, and leadership from Greater Twin Cities United Way spoke. This document was sent to the speakers and their staff.
8. **Instructions for Full-Time Staff:** P+P full-time staff were asked to help at the taxathon, so this document was shared during a presentation at a

staff meeting and used a reference point before and throughout the event guiding staff on how to help during the event.

9. **Talking points for the Volunteer Huddle:** Before each volunteer shift at our tax clinics, we have a volunteer huddle where announcements are shared. These are the notes for the taxathon's clinics. The talking points were read by the staff managing the tax site for that shift.
10. **Table Tents:** The tents were placed throughout the tax clinic informing customers how they could get involved in the taxathon.
11. **Pictures:** Included in this folder are pictures from the 2016 and 2017 taxathon.

For questions or more information about Prepare + Prosper's taxathon, please contact Taylor Putz at [taylor@prepareandprosper.org](mailto:taylor@prepareandprosper.org) or 651-262-2160.

#### Notes on some acronyms:

- P+P = Prepare + Prosper
- TSS = Tax Site Specialist is the volunteer who is responsible for customer support and service for taxpayers, including check-in and check-out.
- IM = Intake Manager is the seasonal staff person who oversees the tax site specialist(s) at the site
- FM = Financial Manager is the seasonal staff who oversees the volunteer financial advocates who coordinate the financial services at the tax sites



## 2017 Plan

### Dates + Shift Times

Friday, February 3

Saturday, February 4

8:30 a.m. – 1 p.m. (new)

9:00 a.m. – 1 p.m. (regular)

12:45 p.m. – 5 p.m. (new)

12:45 p.m. – 5 p.m. (regular)

5:30 p.m. – 9:30 p.m. (new)

8:45 p.m. – 1 a.m. (new)

### Volunteer Breakdown (Average number per shift in 2016)

TSSs: 2 only who volunteer at the main office (plus full-time staff at some shifts)

Preparers: 12

Reviewers: 5

Financial Advocates: 2

Total number of volunteers: 126 + seasonal staff

### Kick-Off (Friday morning)

8:30 a.m. – 8:40 a.m. – Volunteers huddle

8:45 – 8:59 – Short program including countdown to Taxathon with leaders, volunteers and customers

9:00 a.m. – 9:00 a.m. – Taxathon kick-off

## **Celebration (Saturday afternoon)**

~4:45 p.m. (when volunteers start finishing): bring everyone together for a fun photo with party hats etc.

## **Goals for the 24 hours**

200 taxpayers

\$700,000 in refunds

50 savers

400 returns

## **Engagement**

### Customers

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- Popcorn machine from Susan in Dakota County again!
- Inviting the customers from last year to file their taxes if they qualify.
- Like last year, there will be a guessing game.
- More balloons!
- Coloring sheets.
- Peace Coffee.
- Every 25<sup>th</sup> customer wins \$5.
- Story collection interns will be collecting stories and taking photos.
- Idea still in development stage: an activity that moves customers to engage with us on social media, write a review of P+P, and/or an activity to support advocacy efforts.

### Volunteers and seasonal staff

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- Introductions at the beginning of the huddle to build community and connection, especially during the “added” shifts so people can get to know one another.
- T-shirts will be provided by P+P again this year. (Purple)
- New: Geek Quiz! Each shift will have two questions (one tax-related and the other financial services-related). The person who guesses correctly will win a prize.

## Full-Time Staff

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- Available full-time staff will be asked to staff a shift during the taxathon.
- Priority shifts will be the two on Saturday because they are the regular shifts and need more energy.
- All staff will be invited to the kick-off on Friday morning.

## Partners

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- Similar to last year, friends of P+P will be invited to stop by during the taxathon and drop off a treat for the volunteers.
- We'll try to invite more partners this year so there's also food for the customers.

## Logistics/Ambiance

- There will be a countdown clock!
- There will be beverages other than coffee and water.
- There will be more decorations.
- Picture frame for everyone (see below)

## Media

- Similar to last year, TV will be the target for media coverage.

## Frame:



PREPARE  
PROSPER +

# VOLUNTEER CONNECT

taxathon!  
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Taxathon is back!  
Sign up for a shift

Every year, there is an influx of taxpayers at the beginning of the season, dubbed the EITC rush. These are folks that want to get their refunds back right away and often, due to capacity, we lose them to paid preparers. You can help us increase our capacity by joining in on the Taxathon fun. **Taxathon is a 24-hour event, happening February 3, from 9 a.m. – 1 a.m., and February 4, from 9 a.m. - 5 p.m.**, with exciting prizes, treats, and support for our taxpayers. If you are able to pick up any of the extra shifts below, please email Kelly at [Kelly@prepareandprosper.org](mailto:Kelly@prepareandprosper.org) with which shift works for you and we will get you on the schedule.

- Friday, February 3 (9 a.m. - 1 p.m.)
- Friday, February 3 (1 - 5 p.m.)
- Friday, February 3 (5:30 - 9:30 p.m.)
- Friday, February 3 (9:30 p.m. - 1 a.m.)



Hello [NAME],

Our second annual taxathon is February 3 and 4! Like last year, it's 24 hours of tax preparation where volunteers will return more than \$700,000 in refunds for 200+ people during our busiest weekend of the year.

We had a blast at [last year's taxathon](#) and we invite you to be a part of the fun this year!

# taxathon!

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## When and where

Prepare + Prosper's main office  
Friday, February 3, 9 a.m. to 1 a.m.  
Saturday, February 4, 9 a.m. to 5 p.m.

## You're invited to stop by and bring food!

We need help feeding the volunteers and customers. There's a complete list of suggested food below.

If you'd like to stop by and bring food, R.S.V.P. to Taylor at [taylor@prepareandprosper.org](mailto:taylor@prepareandprosper.org)

## Join in the fun!

There will be a short countdown event to kick off the taxathon at 8:45 a.m. on Friday, February 3. Throughout the event, there will be coloring sheets for kids, contest for adults, a live "results board," balloons, and food.

## #taxathon

Follow along throughout the event on Facebook and Twitter as we post pictures and share updates.

*Here's a list of suggested food for the taxathon but if you would rather bring a gift card to Cub Foods, we'll use that to buy food.*

- Fruit
- Vegetables
- Cheese Tray

- *Crackers*
- *Potato Chips*
- *Chips and Salsa*
- *Granola Bars*
- *Cookies*
- *Yogurt*
- *Cupcakes*
- *Anything you'd like to make!*



## Media Advisory/Photo-op

### Contacts:

Taylor Putz, Prepare + Prosper, 651-262-2160, [taylor@prepareandprosper.org](mailto:taylor@prepareandprosper.org)

Marsha Pitts-Phillips, Greater Twin Cities United Way, 612-340-7401, [Marsha.Pitts-Phillips@gtcuw.org](mailto:Marsha.Pitts-Phillips@gtcuw.org)

### **Second annual 2-day “Taxathon,” expected return of \$700,000 in tax refunds**

*Prepare + Prosper launches tax season with 24-hour free tax prep to result in taxpayers claiming Earned Income Tax Credit and Minnesota Working Family Credit*

**WHAT:** [Prepare + Prosper](#) holds second marathon tax preparation “Taxathon” at peak of tax season for low-income individuals and families as part of the *Claim It!* campaign. Volunteers will provide free tax and financial services to hundreds in two-day push expected to result in more than \$700,000 dollars in “claimed” tax credits, including the Earned Income Tax Credit (EITC) and Working Family Credit. *Claim It!* is funded by [Greater Twin Cities United Way](#).

**WHEN: Friday, February 3, 2017 (Day 1)**

**8:45 a.m. – 8:59 a.m.** – Program including countdown to Taxathon with leaders from Greater Twin Cities United Way, Minnesota Department of Revenue, and Prepare + Prosper along with volunteers and tax filers.

**9:00 a.m. Friday – 1:00 a.m. Saturday** – Taxathon kick-off – Volunteer tax preparers work for 16 hours

**Saturday, February 4, 2017 (Day 2)**

**9:00 a.m. – 5:00 p.m.** – Taxathon volunteer tax prep continues for eight hours

**WHERE:** Prepare + Prosper (located in the Court West Building)  
2610 University Ave. W., Lower Level  
St. Paul, MN 55114

**MORE:** Interview opportunities with volunteer tax preparers, taxpayers, and leadership. Follow Prepare + Prosper (**@PrepareProsper**) and Greater Twin Cities United Way (**@UnitedWayTC, #huMNkind**) on Twitter using the hashtag **#taxathon**.

**About Claim it!** – [Claim it!](#) managed by Prepare + Prosper and funded by Greater Twin Cities United Way, is a statewide public awareness campaign to promote the Earned Income Tax Credit and free tax preparation for hardworking Minnesotans. For more information, call 651-262-2160.

**About Prepare + Prosper** – [Prepare + Prosper](#) is a nonprofit focused on financial capability for low-income households. It provides free tax preparation and financial services and products; builds the capacity of other organizations providing these services; and works to advance policies and practices that directly benefit the people it serves. In 2016, 575 volunteers prepared taxes for 13,461 taxpayers who received \$25.3 million in refunds; 1,231 of those taxpayers committed to saving \$1.9 million of their refunds.

**About Greater Twin Cities United Way** – Ranked as Minnesota’s largest nongovernmental social services funder, United Way connects people and resources within our community to challenge and change systems—like Minnesota’s education and jobs gap—that limit our potential. Our mission is to unite caring people to build pathways out of poverty, thereby improving individual lives and the community. Learn more at <https://www.gtcuw.org/> and about our 24-hour, statewide, multilingual information and referral service, United Way 2-1-1 at <http://www.211unitedway.org/>. Greater Twin Cities United Way serves Anoka, Carver, Chisago, Dakota, Hennepin, Isanti, Ramsey, Scott and western Washington counties. For more information call (612) 340-7400

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## FOR IMMEDIATE RELEASE

### Contacts:

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[taylor@prepareandprosper.org](mailto:taylor@prepareandprosper.org)

Marsha Pitts-Phillips, Greater Twin Cities United Way  
612-340-7401 (desk) 612-408-7828 (cell)  
[Marsha.Pitts-Phillips@gtcuw.org](mailto:Marsha.Pitts-Phillips@gtcuw.org)

*Volunteer tax preparers, taxpayers and leadership are available for interviews throughout the taxathon – until 9pm on Friday and 9am – 9pm on Saturday. Prepare + Prosper (located in the Court West Building) 2610 University Ave. W., Lower Level, St. Paul, MN 55114.*

*Pictures from the event can be found on Flickr: <https://flic.kr/s/aHskqX1mny>*

### **Local nonprofit launched 24-hour “Taxathon,” Will Return Half Million in Tax Refunds**

Prepare + Prosper and the Claim it! campaign kicked off tax season with a tax preparation marathon during busiest weekend

**St. Paul – February 5** – Prepare + Prosper launched its “Taxathon” on Friday morning with the goal of returning half million dollars in tax refunds to nearly 200 taxpayers during its busiest time of the tax season. Throughout the taxathon, there will be a giveaway, contests, coloring sheets for kids, balloons, popcorn, and a “results board.” Leadership from Greater Twin Cities United Way and the Minnesota Department of Revenue joined volunteers, taxpayers, and staff to kick off two-day, 24 hours of tax preparation.

“Many low-income working families who anticipate receiving large tax refunds want to file early,” said Tracy Fischman, Prepare + Prosper executive director. “By adding hours this weekend, we are ensuring that more people can be served with high quality free tax assistance and financial services. This also means that fewer people will go to paid preparers, many of whom charge high fees and may sell unnecessary, sometimes harmful, financial products and services.”

Households receiving large refunds are often getting the Earned Income Tax Credit (EITC). According to the Brookings Institution, the EITC is the nation’s most effective anti-poverty tool, moving 6.2 million people out of poverty every year. This year, the maximum credit is \$6,242, and eligibility is determined by family size and income.

According to the IRS, one in five taxpayers eligible for the credit are not claiming it. This year marks the 10<sup>th</sup> anniversary of the Claim it! campaign, an initiative led by Greater Twin Cities United Way and Prepare + Prosper, aimed at increasing the number of eligible taxpayers claiming the EITC.

“United Way’s mission is to create pathways out of poverty and Claim it! is one of the tools that can aid in the process,” says Meghan Barp, United Way senior vice president of Community Impact. She continues, “Since tax year 2006, more than 1.3 million people in the Twin Cities have claimed the Earned Income Tax Credit (EITC) and used it to get ahead, pay down debt, and save for the future.”

The Claim it! campaign also encourages eligible taxpayer to use one of Minnesota's free tax preparation sites.

"There are hundreds of IRS-certified volunteers ready to help taxpayers accurately file their taxes. They can even help identify the credits, such as the Earned Income Tax Credit and the Minnesota Working Family Credit, that taxpayers may qualify for," said Revenue Commissioner Cynthia Bauerly. "I encourage those who qualify to take advantage of these free filing services."

To locate a free tax preparation site, call United Way 2-1-1 by dialing 2-1-1 or 651-291-0211, statewide, toll-free 1-800-543-7709; or visit [www.youclaimit.org](http://www.youclaimit.org).

Follow Prepare + Prosper (@PrepareProsper) and Greater Twin Cities United Way (@UnitedWayTC) on Twitter using the hashtag #taxathon.

**About Claim it!** – Celebrating 10 years, [Claim it!](#), managed by Prepare + Prosper and funded by Greater Twin Cities United Way, is a statewide public awareness campaign to promote the Earned Income Tax Credit and free tax preparation for hardworking Minnesotans. For more information, call 651-262-2160 or United Way 2-1-1.

**About Prepare + Prosper** – [Prepare + Prosper](#) is a nonprofit focused on financial capability for low-income households. It provides free tax preparation and access to financial services and products; builds the capacity of other organizations providing these services; and works to advance policies and practices that directly benefit the people it serves. In 2015, 555 volunteers prepared taxes for 13,256 taxpayers who received \$25 million in refunds; 1,000 of those taxpayers committed to saving \$1.6 million of their refunds.

**About Greater Twin Cities United Way** – Ranked as Minnesota's largest nongovernmental social services funder, [Greater Twin Cities United Way](#) collaborates with business, government and nonprofit organizations to build pathways out of poverty by working in two areas – Safety Net and Education & Jobs. More than 715,000 people in the metro area live at or near poverty. Learn how to Give, Advocate, or Volunteer at <https://www.gtcuw.org/>. Find out about our free, 24-hour statewide multilingual information and referral service, United Way 2-1-1 at <http://www.211unitedway.org/>. Greater Twin Cities United Way serves Anoka, Carver, Chisago, Dakota, Hennepin, Isanti, Ramsey, Scott and western Washington counties. For more information call (612) 340-7400.

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## Kick-Off Program | Friday, February 3<sup>rd</sup>

Thank you for being part of Prepare + Prosper's second taxathon. Like last year, it's 24 hours of tax preparation where volunteers will return more than \$700,000 in refunds for 200+ people during our busiest weekend of the year on Friday, February 3 and Saturday, February 4.

### Location

Prepare + Prosper main office tax clinic  
2610 University Avenue W. in the lower level

*Parking Lot Code: 4321#*

### Suggested Attire

The taxathon is a celebration so please dress as casually as you are comfortable. We encourage speakers to wear attire that represent their organization, like a branded t-shirt (Tracy and our staff and volunteers will be in P+P t-shirts).

### Social Media

Post and share using the hashtag #taxathon

### Agenda

#### 8:30 a.m.

Speakers arrive and go to the tax clinic for coffee and treats.

#### 8:45 a.m.

Speakers, volunteers, guests, customers, and P+P staff will gather in the middle of the tax prep area.

#### 8:50 a.m.

Short program (each speaker will have 3-4 minutes)

- Tracy Fischman (Prepare + Prosper): Welcomes everyone, provides a brief overview of P+P, talk about the taxathon and the goals, highlights the importance of tax time, and introduces the Commissioner and Andrea.
- Commissioner Cynthia Bauerly (Department of Revenue): Celebrates the launch of tax season in Minnesota, thanks the volunteers for their work, and highlights the impact of free tax preparation.
- Andrea Ferstan (Greater Twin Cities United Way): Celebrates the partnership between P+P and GTCUW through Claim it!, shares information about the

Earned Income Tax Credit (EITC), and highlights the best way to claim the EITC is by filing for free.

**8:59 a.m.**

Tracy will lead everyone in the countdown to the taxathon!

**9:00 a.m.**

Taxathon begins! Speakers are welcome to stay around to talk with customers, volunteers, and staff.

**Questions?**

Contact Taylor Putz at [taylor@prepareandprosper.org](mailto:taylor@prepareandprosper.org) or 651-262-2160.

# taxathon!

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During the busiest time of the tax season, Prepare + Prosper is excited to hold its second taxathon! It's 24-hours of tax preparation—volunteers will prepare tax returns for 200+ taxpayers, returning more than \$700,000 in refunds. Throughout the taxathon, there will be color sheets for kids, contest for adults, a live “result board,” balloons, and food!

## Full Time Staff To-Dos

- Update the “results board.” Using the “5 for 25” giveaway tracking sheets, work with the TSS/IM/FM to calculate the total amount of refunds, customers served, savers and update the results board at the end of each shift.
  - Include those getting a refund that those that are not on the sheet. Write zero for those not getting a refund.
  - Use wet sponge (located above the sink in the LL break room) to erase.
  - Take a photo of entire results board 😊 with your phone and immediately send to Stacy for posting on social media.



- Help volunteers get their t-shirt
  - T-shirts will be on gray table to the right of the breakroom
- Give energetic huddle presentation about the “taxathon”
  - Script provided by Taylor
- Stock food/beverage (*coffee donated by Peace Coffee!*) table and help make popcorn (*machine donated by Susan with Dakota County - star Claim it! campaign partner!*)
  - Instructions on how to use machine are sitting on top of the machine.
- Greet customers as they come in, welcome them to the “taxathon”
  - There brief note about the taxathon in their appointment reminder
  - There are signs around the clinic describing activities

- **Visit with customers and volunteers**
  - If a customer is having a great time and there's a story collection intern at the clinic, refer them to Di or Eden for an interview. If there's not a story collection intern, encourage them to send their story to [stories@prepareandprosper.org](mailto:stories@prepareandprosper.org).
- **Encourage kids to color the coloring sheets.** Help them hang up completed coloring sheets (using orange string hanging from wire that borders the waiting area and prep area) and **take photos of completed sheets** 😊 with your phone and text to Stacy.
  - Extra sheets are at the LL reception desk
- **Grab thank you cards** that are sitting at the reception desk and sign your name. Have TM, IM, and FM write their names, too. Hand out at end of shift.
- **Tidy up as you are able.** Take garbage out to dumpster. Clean up food table. Throw out old food. Please leaving food/treats in non-disposal-able dish should have their name written on it so we can return it to them.
- If you have any **visitors stop by with food** (friends of the organization or volunteers) greet them, thank them, have them put food in the break room. If they're willing, **take a photo of them with their treat** 😊 with your phone and text to Stacy or Taylor.
  - If you have scheduled visitor during your shift, Stacy or Taylor will let you know.
- The IM or TSS will be giving every 25<sup>th</sup> customer a \$5 envelope! **Please take a photo of the customer holding a sign that says "I'm the ... customer!"** 😊 (if he/she is willing) with your phone and text to Stacy or Taylor.
  - See directions sheet for more detail.
  - Customer needs to fill out release form!



- If a **customer comes in without an appointment** there are extra spots available in the schedule so if they qualify, we will serve them.
- If a **member of the media** shows up, greet them, ask them what station they're from, and call Taylor ASAP. Give them a tour of the tax clinic.

- For the volunteers during each shift, there will be **two quiz questions** that they can answer. They will be posted in the break room and you will need to make sure before the huddle the right shift's questions are posted. There will be a box where volunteers can submit their answer.
- Get photos please!!! 😊 Use the picture frames to get the photos of customers and volunteers. Feel out the crowd or volunteers on the shift and attempt some of what's below.
  - Get random and fun shots of the taxathon – volunteers in action or posing. Use your phone or P+P camera behind reception desk. Send to Stacy or Taylor. If you post any pictures, mention Prepare + Prosper and use the #Taxathon.



- Try to get a few of volunteers excited or giving “kudos” or a “shout out” (big smile and thumbs-up or whatever. *Stacy wants to be able to use these on social media for other stuff like thanking a funder or volunteers.*





# Talking Points for the Volunteer Huddle

- Thank you for volunteering at our second annual taxathon! It means a lot.
- The taxathon is 24-hours of tax preparation where 100+ volunteers will prepare tax returns for 200+ taxpayers, returning more than \$700,000.
- The idea for the taxathon came from Aleathea who is a tax site manager at Creekside and Anel who is the office manager because of the high demand of requests for free tax preparation. Due to capacity, we normally have to turn people away who may resort to filing their taxes with a paid preparer, paying hundreds of dollars in fees.
- We are in our X hour of the taxathon and you can check the results board to see how far we are away from reaching our goals.
- Although today is the taxathon, the tax clinic will function as normal except for a few added bonuses including a color sheet for kids, contest for adults, a live “results board,” balloons, countdown clock, popcorn, food, and more!
- For each shift, there are two quiz questions for the volunteers here in the break room so take a slip and submit your answer. Those who answer both of the questions correctly will be entered into a drawing.
- If you would like to post anything on social media, we’re asking you to use the hashtag #Taxathon.
- Be prepared to be photographed throughout the shift and have fun!

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@PrepareProsper

#taxathon

The most creative post will win \$50.

Use the hashtag #taxathon

Post on Facebook or Twitter!

Are you on social media?

taxathon!

taxathon!

## Welcome to the taxathon!

In 24 hours, we're preparing 400 tax returns for 200+ people, aiming for \$700,000+ in refunds during our busiest weekend!

- Free popcorn, courtesy of our friends at Dakota County!
- Free coffee all weekend from Peace Coffee!
- Coloring sheets for everyone! Please color and hang on the wall in the tax prep area when finished.
- Take a guess at how many candy bars are in the jar. Winner receives a \$50 Visa gift card.
- Giveaway! Every 25th customer receives \$5.

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