



## Organizing a Taxathon Training Reference Guide

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

### What is a Taxathon?

- A taxathon is a special type of tax filing event to promote free tax sites and excite the community around EITC and free tax filing
- Taxathons are a great way to:
  - Jumpstart your outreach early in the tax season
  - Attract new EITC eligible clients
  - Make tax filing more fun for your team and community
- There isn't one set formula for how to organize a taxathon. The format can always be changed based on the size of your organization and the needs of your community.

### Large Model Taxathons

*[Prepare + Prosper](#) runs and promotes programs and policies that foster financial health and wealth in Minnesota. Prepare + Prosper has organized large scale taxathons for two years.*

- Why a taxathon?
  - Always had a large wave of clients coming in February, but couldn't keep up with the demand
  - Came up with the idea of a marathon 24 hour tax filing event which could attract a lot of media coverage and meet the client demand
- Experience
  - Held the taxathon in the main office, which was an appointment only site
  - Used prior year data to host the taxathon during the busiest weekend of the tax season, the first weekend in February
  - Results
    - 125 volunteers helped at the taxathon
    - More than 200 taxpayers filed free taxes
    - Returned over \$700,000 in tax refunds
    - Numbers are very important for media attention
  - Involved staff from tax, volunteer, development, and marketing teams
    - 3 planning meetings from Sept-Jan
  - Local partners and political leaders came to kickoff event
    - Used Facebook Live
  - Updated a results board frequently with refund amounts and clients served
  - Held several contests for more engagement
  - Arranged for superheroes to come to the site for fun
  - Used picture frames to engage customers and volunteers, posted photos on social media
  - Partners donated food and coffee for volunteers
  - Several TV stations came
- Lessons learned
  - Plan for walk-ins that hear about the taxathon from the news
  - Get additional balloons, especially for kids that want to take them home

- Establish a clear main “point person” for the taxathon
- Plan more activities throughout the volunteer shifts

### Medium Model Taxathons

[The Piton Foundation](#) improves the lives of Colorado’s low-income children and their families by increasing access to quality early childhood opportunities and fostering healthy family environments. The Piton Foundation organized a medium scale taxathon in 2017.

- Why a taxathon?
  - Struggled to do outreach and promotion for EITC Awareness Day
  - Wanted to generate more media attention
  - Sought to offer additional services to clients
  - Opportunity to strengthen partnerships with other organizations
- Experience
  - Instead of 24 hours of tax filing, started with 12 hours
  - Walk-in only site
  - Results
    - 350 volunteer hours
    - Filed almost 100 tax returns
    - \$189,000 in federal tax refunds
  - Co-hosted taxathon with partners so held event at a neutral central site
  - Didn’t have capacity to plan for a speaking event
    - Focused on building partnerships with 9 organizations instead
    - Set-up tables/booths like a resource fair while clients waited for tax prep
  - Led to a lot of social media engagement
  - News station came to interview about the taxathon
  - Provided free food and coffee
  - Held a raffle every hour for volunteers for a Starbucks gift card
  - 2 elected officials attended
- Lessons learned
  - Begin planning early, around Sept
  - Have scheduled appointments
  - Train partner organizations on how to engage with clients more
  - Plan for engaging activities at the site
  - Recruit volunteers that aren’t associated with VITA

### Small Model Taxathons

[The Cooperative Ministry](#) improves the lives of the working poor in the South Carolina Midlands through crisis assistance and financial sustainability. The Cooperative Ministry hosted a small scale taxathon in 2017.

- Why a taxathon?
  - Media coverage much more likely with an event like a taxathon
  - Easy way to recruit new volunteers
  - Able to serve more clients
- Experience
  - Did not have a budget for the filing event, held the event for free
  - Held the event on the first Saturday in February for 4 hours
  - Walk-in only site
  - 65 tax returns
  - Used an existing busy tax site to host the event
    - Tax site was willing to open on a Saturday and assist with the event, did not charge for the space
  - Volunteer recruitment was easy

- 10 new volunteers
  - Set-up 3 booths for clients while they waited
    - Banking and savings program, healthcare information, & taxpayer advocate
  - Played music to create a fun environment
  - Donated food available for volunteers
- Lessons learned
  - Arrange an early intake station to help organize all the clients coming
  - Identify a go-to advance preparer
  - Use partnerships you already have, don't try to build new ones for this event
  - Take lots of photos

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