VITA Programs: Boost Capacity to Serve Taxpayers with Disabilities

December 1, 2022
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• Please note: This webinar is being recorded and you will receive an email with the YouTube link within a week. The materials will be placed on the National Disability Institute website at: Taxes and Tax Preparation.
Welcome (1)

Michael R. Roush, M.A., AFC®
Director, Center for Disability-Inclusive Community Development (CDICD)
National Disability Institute
mroushe@ndi-inc.org
National Disability Institute (NDI)

• NDI is a national nonprofit organization dedicated to building a better economic future for people with disabilities.

• NDI is the first national organization committed exclusively to championing economic empowerment, financial education, asset development and financial stability for all persons with disabilities. NDI affects change through public education, policy development, training, technical assistance and innovative initiatives.

• Visit NationalDisabilityInstitute.org.
Thank you

This webinar is hosted with support from

SHARE OUR STRENGTH®
Welcome (2)

Ana Maria Rivera
Program Manager
Family Economic Mobility

SHARE OUR STRENGTH
Polling Question #1

• Does your free tax preparation/VITA program currently serve taxpayers with disabilities?
  o Yes
  o No
  o Not applicable
Polling Question #2

• If you are with a free tax preparation/VITA program, how confident are you in your outreach efforts to taxpayers with disabilities?
  o Very confident
  o Somewhat confident
  o Not confident at all
  o Not applicable
Polling Question #3

• If you are with a free tax preparation/VITA program, how confident are you in making accommodation requests for taxpayers with disabilities?
  - Very confident
  - Somewhat confident
  - Not confident at all
  - Not applicable
Polling Question #4

- If you are a person with a disability, a family member or a disability service provider, have you used a VITA/free tax preparation service in the past?
  - Yes
  - No
  - Not sure
  - Not applicable
NEW Resources and Tools to Boost Capacity to Serve Taxpayers with Disabilities
TAXES & TAX PREPARATION

Tax preparation is a way to engage taxpayers with disabilities in a larger conversation about financial wellness and economic advancement, including the Earned Income Tax Credit (EITC). National Disability Institute continues to work to increase Volunteer Income Tax Assistance (VITA) awareness and to build the capacity of tax coalitions to better serve taxpayers with disabilities, both in person and online.

FREE TAX PREPARATION

WHAT ARE THE OPTIONS AND WHO IS ELIGIBLE?

There are many free tax preparation options available. On average, households with an adjusted gross income (AGI) of $66,000 or less may qualify for free tax preparation and filing using many different free tax preparation options both online and in person. Eligibility criteria can change from year to year, so be sure to check the options for eligibility with the service you choose.

RECENT WEBINARS:

TAXPAYERS WITH DISABILITIES AND FAMILIES: IT’S NOT TOO LATE TO MAXIMIZE YOUR 2021 TAX CREDITS
COMMUNITY ORGANIZATIONS, SERVICE PROVIDERS AND EMPLOYERS ARE ENCOURAGED TO USE THESE FREE RESOURCES TO HELP INCREASE AWARENESS OF FREE TAX PREPARATION OPTIONS AND SERVICES.

DEVELOP FREE TAX PREPARATION PARTNERSHIPS

- **Partner with the IRS** and make a difference in your community
  - **Utilize** IRS Partner and Volunteer Resource Center
  - **Visit** the IRS Partner Outreach Corner for shareable content
- **Locate** a VITA site near you
- **Become** an IRS VITA Volunteer
- **Contact** AARP Foundation Tax Aide to volunteer
- **Register** as a partner with MyFreeTaxes.com
- Call or **visit** 211 for expert essential services in the community

LOOKING FOR LOCAL PARTNERSHIP OPPORTUNITIES?

Download our Quick Reference Guide: *Identifying Disability Partners in Your Community*

Informing Others About Free Tax Preparation
Website: Importance of Spreading the Word

DOWNLOAD SHAREABLE OUTREACH MATERIALS

- You Earned It
- Prepare & File Your Taxes for Free
- Mythbusters: Your Earned Income Tax Credit
- IRS Partner Toolkit
- MyFreeTaxes Partner Portal
- EITC Awareness Day (January) Marketing Materials
- Get it Back campaign EITC and Child Tax Credit Outreach
- Outreach Connection free tax content from IRS
- IRS social media channels
- Social Media toolkit from IRS

DESIGNATE RESOURCES FOR FREE TAX PREP AWARENESS

- Provide staff training about free tax preparation services.
- Leverage company electronic and print newsletters and include downloaded information about free tax prep partners in the community.
- Allow employees extra time during or after work hours to prepare returns using online tax preparation software at work.
- Design a marketing plan
Helping others

DEVELOPING FREE TAX PREPARATION PROGRAMS

Understanding what free tax preparation is and promoting it are a great first step. But you may want to expand your outreach to include providing free in-person tax prep services on site. Doing this can be as simple as providing computer access for customers or as involved as hiring and training tax coaches to assist customers. Learn more about the options for developing your own free tax preparation program.

GETTING STARTED

The Volunteer Income Tax Assistance (VITA) grant program is an IRS initiative designed to support free tax preparation services for the underserved populations through various partner organizations. This service enables persons with disabilities, the elderly, low-to-moderate-income individuals, and limited English speakers to file their taxes each year. IRS awards matching funds to organizations that offer free tax preparation services during the tax filing season.

HOW TO HELP IN YOUR COMMUNITY

Apply for a VITA grant
Become a VITA volunteer
Become an IRS Partner
  - Offer space within your facility for free tax prep by trained volunteers on site
  - Encourage employees to become VITA volunteers
  - Provide a tax coach or other trained volunteer onsite

YOU CAN BECOME A VITA VOLUNTEER!

Volunteer to help your community with the Volunteer Income Tax Assistance Program! You will receive training to provide free tax help for low-to-moderate income families who need assistance preparing their tax returns. As a volunteer, you will join the thousands of others who each year prepare millions of tax returns at thousands of tax sites nationwide.

Get Started
EXPANDING FREE TAX PREPARATION IN THE DEAF COMMUNITY

One of the best ways an organization can work towards effective communication access to the Deaf and hard-of-hearing community is to partner with the Deaf community. Through this collaboration, your organization doesn't have to be the expert, but rather can learn about the diversity of the Deaf community, how/when to hire sign language interpreters and how your agencies may work together to leverage resources. Below is a list of tips on how to ensure your agency is inclusive of the Deaf community in free tax preparation and other services.

- Use ‘Deaf’ alongside ‘disability’ in messaging and include Deaf partners on any listserves your agency sends out
- Use symbols and pictures in handouts, PPTs, resources
- Nominate Deaf partners to serve on local/state committees
- Encourage partnership between your network and Deaf partners
- Connect with Vocational Rehabilitation Counselors for the Deaf (RCD)
- Connect with Schools/College Programs for the Deaf
- Connect with Centers for Independent living with Deaf Programs/Staff
- Connect with Mental Health and Developmental Disability Programs for Deaf
- Promote and use Video Relay Services with your Deaf partners
- Recommend/Initiate Deaf Taskforces for deeper collaboration and more complex challenges

For other resources on Serving d/Deaf Taxpayers, check out Statewide Services for Individuals who are Deaf and Hard of Hearing and IRS Videos in American Sign Language (ASL).

Free Tax Prep For People With Disabilities
Resources for Taxpayers with Disabilities

Free Tax Prep For People With Disabilities
Ensure Your Free Tax Prep Site is Accessible to All

Effective Strategy Handouts

- Examples of People First Language
- Selecting an Interpreter
- Making Accommodation Requests for Taxpayers with Disabilities
- Why Ask the Disability Question at VITA Sites? | Asking the Disability Question – A Script for VITA Preparers
- Technology Accessibility Resources – Making Sure Your Website and Technology is Accessible
Disability Script

Why Ask the Disability Question at VITA Sites?

<table>
<thead>
<tr>
<th>Why the Disability Question?</th>
<th>Why the Disability Question?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A Script for VITA Tax Preparers</strong></td>
<td><strong>A Script for VITA Tax Preparers</strong></td>
</tr>
<tr>
<td>- It provides information on demographics being served at your VITA site which includes people with disabilities who are often not counted.</td>
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</tr>
<tr>
<td>- It expands research efforts on VITA customers with disabilities.</td>
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</tr>
<tr>
<td>- Data collected is often used to report back to current and potential funders so we may continue to provide this valuable free service.</td>
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<tr>
<td>- This information assists the Outreach and Education Department of the IRS which is committed to assisting people with disabilities on Tax Education, Free Tax Preparation, Financial Education and Asset Building opportunities.</td>
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</tbody>
</table>

Please note: All information collected is confidential. There are potential tax credits you might be eligible for if you or a person in your family does have a disability.

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Download: Why Ask the Disability Question at VITA Sites

bit.ly/Disability-Question
Resource: Person-First Language

Examples of Person-First Language

“People-first” language helps us remember that people are unique individuals and that their abilities or disabilities are only part of who they are. When writing or speaking about people with disabilities, it is important to put the person first. Group designations such as “the blind,” “the retarded,” or “the disabled” are inappropriate because they do not reflect the individuality, equality, or dignity of people with disabilities. Further, words like “normal person” imply that the person with a disability is not normal, whereas “person without a disability” is descriptive, but not negative. The accompanying chart shows examples of suggested alternative language to negative phrases.

<table>
<thead>
<tr>
<th>Negative Phrases</th>
<th>Suggested Alternative Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retarded, mentally retarded, mentally defective</td>
<td>Person with an intellectual or developmental disability</td>
</tr>
<tr>
<td>Mentally ill, defective,nuts, crazy</td>
<td>Person with a mental health condition; Person living with a mental health condition or illness</td>
</tr>
<tr>
<td>The blind, partially blind, vision impaired</td>
<td>Person who is blind; Person who has low vision; Person who has a vision impairment; Person whose vision is impaired</td>
</tr>
<tr>
<td>The disabled, handicapped, physically challenged</td>
<td>Person with a disability</td>
</tr>
<tr>
<td>The Deaf, Deaf and dumb, Deaf-mute</td>
<td>Person who is Deaf</td>
</tr>
<tr>
<td>Suffers a hearing loss, hearing impaired, partially Deaf</td>
<td>Person who is hard of hearing</td>
</tr>
<tr>
<td>Deaf and dumb, blind and mute</td>
<td>Deaf-Blind Person; DeafBlind</td>
</tr>
<tr>
<td>Afflicted by MS</td>
<td>Person who has multiple sclerosis</td>
</tr>
</tbody>
</table>

Other Empowering Language:

If you are on a panel, be sure to ask which pronouns someone goes by. Don't make any assumptions about a person's pronouns.

Examples of Pronouns:
- She/Her/Her
- He/Him/His
- They/Them/Theirs
- Zim/Zir/Zirs (Zim rhymes with them, Zir rhymes with their)

Download: Examples of Person-First Language
**Resource: Accommodation Requests**

**Making Accommodation Requests**

What is an accommodation?

According to the Americans with Disabilities Act, any business open to the public shall make reasonable modifications in policies, practices, or procedures when the modifications are necessary to afford goods, services, facilities, privileges, advantages, or accommodations to individuals with disabilities, unless the public accommodation can demonstrate that making the modifications would fundamentally alter the nature of the goods, services, facilities, privileges, advantages, or accommodations.

Why should the organization include accommodation statements?

Accommodation statements are necessary to ensure that persons with disabilities have access and effective communication (alternate formats, interpreters, etc.) for programs and services. It also tells persons with disabilities of your organization's programs and services, and informs them of the policies and procedures for requesting reasonable accommodations.

**Step 1: Create Accommodation Statement**

- What content should be included in the accommodation statement?
  - **Who to contact for an accommodation?**
  - **What the accommodation statement is intended for:**
  - **Where the person with the disability go to receive assistance:**
  - **How to contact the person:**
  - **If possible, provide contact information:** (e.g., phone number, email address)
  - **If possible, provide alternative methods:** (e.g., phone number, email address)

**Step 2: Post Accommodation Statement**

- **Where:** Post an accommodation statement anywhere you are promoting services or activities.
  - **Where:** Anywhere you are promoting information (e.g., newsletter, special events, brochures, organization, websites, mailings, letters, online,

**Step 3: Fulfilling an Accommodation Request**

- **Who is making the request?** Consult the individual with a disability FIRST.
- **What do they need?** Ask them what they need. Be sure to ask questions to find out about their specific needs. Consider their individual preferences and any other accommodations that may need to be made.
- **What are the needs?** Make sure that you understand the needs of the individual.
- **Whoever is involved?** Ask who else needs to be involved.

**Examples of Post-Notice Accommodations**

- **Examples of Notice Accommodations**
  - **Examples of Notice Accommodations**
  - **Examples of Notice Accommodations**
  - **Examples of Notice Accommodations**

**Download: Making Accommodation Requests and What is an Accommodation?**
Customizable Promotional Flyers

Downloadable flyer: Your Earned Income Tax Credit Mythbusters

Downloadable flyer: Prepare and file your taxes for free

Downloadable flyer: You Earned it
## Social Media Posts & Toolkit (1)

- **NDI/Share our Strength Social Media Messages**

<table>
<thead>
<tr>
<th>TOPIC</th>
<th>AUDIENCE</th>
<th>KEY MESSAGE</th>
<th>SOURCE</th>
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<tbody>
<tr>
<td>DISABILITY SPECIFIC</td>
<td>Families with children with disabilities</td>
<td>#Parents of kids with disabilities: If you qualify, an IRS credit can mean &lt; #tax refund #EITC <a href="https://go.usa.gov/xRFAk">https://go.usa.gov/xRFAk</a></td>
<td>IRS</td>
</tr>
<tr>
<td>DISABILITY SPECIFIC</td>
<td>Individuals with disabilities</td>
<td>Special rules help people with disabilities qualify for EITC <a href="https://go.usa.gov/xRFAk">https://go.usa.gov/xRFAk</a> #InclusionWorks</td>
<td>IRS</td>
</tr>
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<td>DISABILITY SPECIFIC</td>
<td>Individuals with disabilities</td>
<td>Millions of #PeopleWithDisabilities miss out on EITC because they don’t file an IRS #tax return <a href="https://go.usa.gov/xRFAk">https://go.usa.gov/xRFAk</a></td>
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<td>Individuals with disabilities</td>
<td>#PeopleWithDisabilities: Even if not required, filing a tax return with an IRS is only way to receive the EITC tax credit. Find out if eligible at <a href="https://go.usa.gov/xRFAk">https://go.usa.gov/xRFAk</a></td>
<td>IRS</td>
</tr>
<tr>
<td>DISABILITY SPECIFIC</td>
<td>Individuals with disabilities</td>
<td>#PeopleWithDisabilities: EITC #tax credit isn’t counted as income for SS disability benefits for 12 months <a href="https://www.irs.gov/credits-deductions/individuals/earned-income-tax-credit/disability-and-the-earned-income-tax-credit-eict">https://www.irs.gov/credits-deductions/individuals/earned-income-tax-credit/disability-and-the-earned-income-tax-credit-eict</a></td>
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# Social Media Posts & Toolkit (2)

- How to use the document, News Articles, Hashtags and Accounts to Follow

<table>
<thead>
<tr>
<th>OTHER CREDITS</th>
<th>Audience</th>
<th>Description</th>
<th>IRS</th>
<th>Link to IRS Social Media Graphics</th>
</tr>
</thead>
<tbody>
<tr>
<td>EITC- Earned Income Tax Credit</td>
<td>Everyone</td>
<td>#EITC: Get it and Get it Right. Visit IRS.gov - <a href="https://go.usa.gov/xRFGm">https://go.usa.gov/xRFGm</a></td>
<td>IRS</td>
<td>LINK TO IRS SOCIAL MEDIA GRAPHICS</td>
</tr>
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<td>EITC- Earned Income Tax Credit</td>
<td>Everyone</td>
<td>Single? No children? See if EITC works for you - <a href="https://go.usa.gov/xRFGE">https://go.usa.gov/xRFGE</a></td>
<td>IRS</td>
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<td>You earned it. Now file, claim it and get it - <a href="https://go.usa.gov/xRFGm">https://go.usa.gov/xRFGm</a></td>
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<td>Ask your tax preparer about EITC, you may be eligible - IRS <a href="https://go.usa.gov/xRFGE">https://go.usa.gov/xRFGE</a></td>
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<td>EITC- Earned Income Tax Credit</td>
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<td>Tax knowledge is freedom. Find out if you qualify for the Earned Income Tax Credit. What will you do with the extra money in your pocket? <a href="https://www.irs.gov/credits-deductions/individuals/earned-income-tax-credit-eitc">https://www.irs.gov/credits-deductions/individuals/earned-income-tax-credit-eitc</a></td>
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<td>Free tax preparation help is available online and through a volunteer organization near you - <a href="https://go.usa.gov/xRFGV">https://go.usa.gov/xRFGV</a> EITC #Get it Right.</td>
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Previous NDI Tax-Related Webinars

• **Creating a Plan to Promote Free Tax Preparation Services to Taxpayers with Disabilities** - November 2, 2022

• **Taxpayers with Disabilities and Families: it's Not Too Late to Maximize Your 2021 Tax Credits** - October 6, 2022
Guest Presenter

Don Dill
Senior Tax Analyst
SPEC HQ – National Partnerships
Internal Revenue Service
Resources

• Accessible Forms & Publications
• IRS ASL Videos
• Disability Related Products
• More Information for People with Disabilities
Special Guest

Sara Johnson
Co-Founder and COO

CASH CAMPAIGN
OF MARYLAND
Creating Assets, Savings and Hope
Q & A
EVALUATION

Please complete post-webinar evaluation upon sign-off
Additional Questions or Need Technical Assistance for Your Tax Outreach

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