

# Creating a Plan to Promote Free Tax Preparation Services to Taxpayers with Disabilities



November 3, 2022

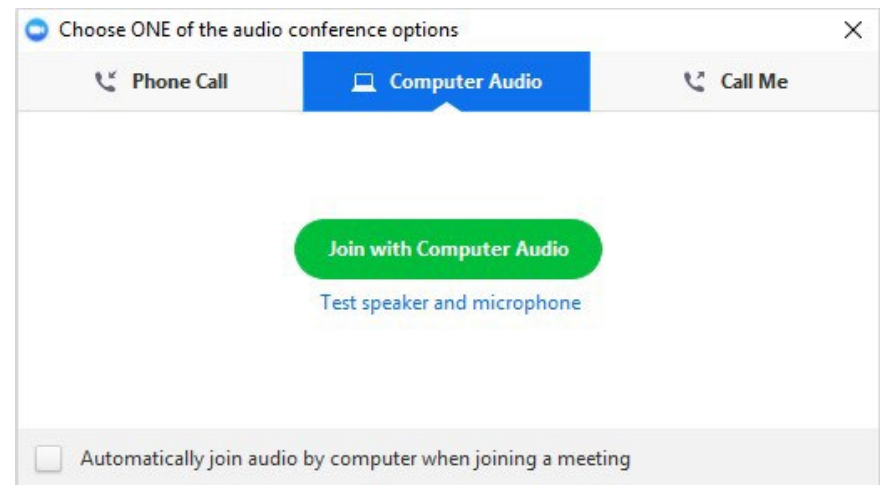
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- Please note: [This webinar is being recorded and the materials will be placed on the National Disability Institute website.](#)

# Welcome



**Michael R. Roush, M.A., AFC®**  
Director, Center for Disability-Inclusive  
Community Development (CDICD)  
National Disability Institute  
[mroush@ndi-inc.org](mailto:mroush@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](https://www.NationalDisabilityInstitute.org).

# Thank you

This webinar is hosted with support from





# Polling Question #1

- Do you or your organization currently promote free tax preparation services?
  - Yes
  - No

## Polling Question #2

- How familiar are you with locating a free tax preparation site in your area?
  - Very familiar
  - Somewhat familiar
  - Not familiar at all

## Guest Presenter



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



# Stakeholder Partnerships, Education and Communication (SPEC)

National Disability Institute

Creating a Plan to Promote Free Tax  
Preparation Services to Taxpayers with  
Disabilities

November 2022



# Agenda

- Stakeholder, Partnerships, Education and Communication (SPEC)
- Promoting Free Tax Preparation Services In Your Community
  - Tax Time Is A Key Financial Catalyst
  - Sharing VITA/TCE Messages
  - Becoming a VITA/TCE Volunteer
  - Operating a VITA/TCE Site
- Additional Resources



# Stakeholder Partnerships, Education and Communication (SPEC)

- IRS' Stakeholder Partnerships, Education and Communication (SPEC) Unit is the Outreach Education function of the IRS's Wage and Investment Division
- Mission is to assist our customers in satisfying their tax responsibilities by building and maintaining partnerships with key stakeholders and leveraging their resources to inform, educate and communicate with our customers



# Stakeholder Partnerships, Education and Communication (SPEC)

- SPEC focuses efforts on low to moderate-income taxpayers (defined as within the EITC threshold), senior citizens, persons with disabilities, those with limited English proficiency and Native Americans.
- Taxpayer education programs include the delivery of key messages that educate or inform individual taxpayers about meeting their tax obligations and is often accomplished through the collaboration with trusted community organizations



# Stakeholder Partnerships, Education and Communication (SPEC)

- SPEC developed a leveraged approach to taxpayer service by placing primary emphasis on partner involvement and relationship management as key elements in achieving its objectives
- SPEC has been privileged and honored to work extensively with the National Disability Institute since 2003 providing Persons With Disabilities education, outreach, free tax preparation services and asset building opportunities





# VITA/TCE 2022 Filing Season Results

- Over 6,000 VITA/TCE sites and nearly 60,000 volunteers supported the filing season. They:
  - Prepared over 2.1 million federal returns (nearly 244,000 returns for people with disabilities).
  - Prepared over 1.4 million state returns.
  - Achieved 99% electronic filing rate.
  - Returned over \$2,742 billion dollars in federal refunds & \$353 million in state refunds



# Promoting Free Tax Preparation Services In Your Community



# Promoting Free Tax Preparation Services

## Tax Time Is A Key Financial Catalyst

- For Many Taxpayers, A Tax Refund Is The Largest Single Source of Income They Receive
- Assisting Taxpayer Receive All Tax Refunds To Which They Are Entitled Can Lead to Increased Opportunities to Start/Increase Financial Stability Opportunities (Savings, Investing, Home Ownership, etc.)



# Promoting Free Tax Preparation Services

## Tax Time Is A Key Financial Catalyst

- Critical Tax Credits – Administered Through the Tax Code - Provide Opportunity For Significant Tax Refund
  - Child Tax Credit
    - Up to \$2,000 Per Child
  - Earned Income Tax Credit
    - Up to \$7,430 for Family With 3 or More Qualifying Children
    - Up to \$600 For Individuals With No Children



# Promoting Free Tax Preparation Services

## Tax Time Is A Key Financial Catalyst

- Critical Tax Credits (cont.)
  - Child and Dependent Care Credit
    - Up to \$1,050 For One Child and Up to \$2,100 For Two or More Qualifying Children
- Key Points For Tax Credits
  - Partially/Totally Refundable
  - Need Earned Income (Wages/Business)
  - MUST File A Tax Return



# Promoting Free Tax Preparation Services

## Sharing VITA/TCE Messages

- Completing A Tax Return Can Be A Very Challenging and Confusing Ordeal
  - Taxes Are Complicated & Ever Changing
  - Tax Myths Circulate Continually
    - Not “Required” To File
    - Lose All Government Benefits If You File A Tax Return
  - Tax Preparation Is Expensive And Often Predatory



# Promoting Free Tax Preparation Services

## Sharing VITA/TCE Messages

- Volunteer Income Tax Assistance (VITA)
  - Started in 1969
  - IRS sponsored program offering free tax filing assistance to low & moderate income taxpayers
  - Sites operated by community based, non-profit organizations
  - Sites located in community centers, libraries and at neighborhood service provider locations
  - Free tax returns prepared by IRS certified volunteers



# Promoting Free Tax Preparation Services

## Sharing VITA/TCE Messages

- Tax Counseling for the Elderly (TCE)
  - Authorized by Congress in 1978
  - Focused on providing free tax preparation to taxpayers who are 60 years and older
  - Majority of TCE Sites operated by AARP Foundation Tax-Aide Program that started providing services in 1968.
  - Sites located in primarily in senior centers, community centers and libraries
  - Free tax returns prepared by IRS certified volunteers and trained to Tax-Aide standards





# Promoting Free Tax Preparation Services

## Sharing VITA/TCE Messages

- Educate On Benefits Of Filing A Tax Return
- Educate/Inform About The Benefits Of Using A VITA and TCE Site To Receive High Quality, Free Tax Preparation Services
  - Employees
  - Community Providers
  - Individuals/Families
  - Caregivers



# Promoting Free Tax Preparation Services

## Sharing VITA/TCE Messages

- Educate/Inform About Availability of VITA and TCE Sites In Your Community
  - Open In Late January – Close Late April
  - Serve Those Generally Making Less Than \$60K
  - Find Local Sites
    - [VITA/TCE Site Locator Tool](#)
    - [AARP Tax-Aide Site Locator Tool](#)



# Promoting Free Tax Preparation Services

## Sharing VITA/TCE Messages

- Become A VITA/TCE Volunteer
  - Provides A Great Return To Those You Serve and Your Community
  - Provides Individual With Life-Time Skills
  - Volunteers Are The Key To The Success and Survival Of The VITA/TCE Programs
  - Volunteers From The Disability Community Provide Additional Trust In The VITA/TCE Services For People With Disabilities Accessing These Services



# Promoting Free Tax Preparation Services

## Sharing VITA/TCE Messages

- Become A VITA/TCE Volunteer
  - IRS and VITA/TCE Partners Will Provide Extensive Training
    - Virtual and In-Person Training Offered
  - IRS Provides Free Tax Law Training Materials and Resources
  - Volunteers Need No Experience
    - Select From A Variety Of Roles To Serve



# Promoting Free Tax Preparation Services

## Sharing VITA/TCE Messages

- Become A VITA/TCE Volunteer
  - Contact Any Local Site Operating In Your Community For More Information On How To Volunteer
  - [Utilize IRS Online Volunteer Portal To Submit Your Name To Be A Volunteer](#)
  - [AARP Tax-Aide Volunteer Information](#)



# Promoting Free Tax Preparation Services

## Operating a VITA/TCE Site In Your Community

- Determine If You Have The Resources To Operate A Free Tax Preparation Site
  - Is There A Need In Your Service Area?
  - Do You Have Convenient Location For Taxpayers Being Served?
  - Do You Have The Resources To Operate A Site?
    - Staffing
    - Equipment (Computers)
    - Access to Volunteers



# Promoting Free Tax Preparation Services

## Operating a VITA/TCE Site In Your Community

- Next Steps If You Determine You Have The Capability And Desire To Operate A Free Tax Preparation Site
  - Reach Out To Other VITA/TCE Sites In Your Community To See If There Is An Existing Coalition In Your Community You Could Join
  - Reach Out To SPEC To Share Your Interest By Sending E-Mail to [partners@irs.gov](mailto:partners@irs.gov)
  - Reach Out To NDI Staff For More Specific Local Contact Information



# Additional Resources for Free Tax Preparation





# Resources

- [Free Tax Preparation Information – Partners](#)
- [Free Tax Preparation Information – Taxpayers](#)
- [What To Bring To Your Local VITA/TCE Site](#)



# Resources

- [VITA/TCE Flyer - Publication 3676-B – IRS Certified Volunteers Providing Free Tax Preparation](#)
- [Information On Being A VITA/TCE Volunteer](#)
- [Becoming An IRS Partner To Help Your Community](#)



# Additional Resources for Disability Related Tax Issues



# Resources

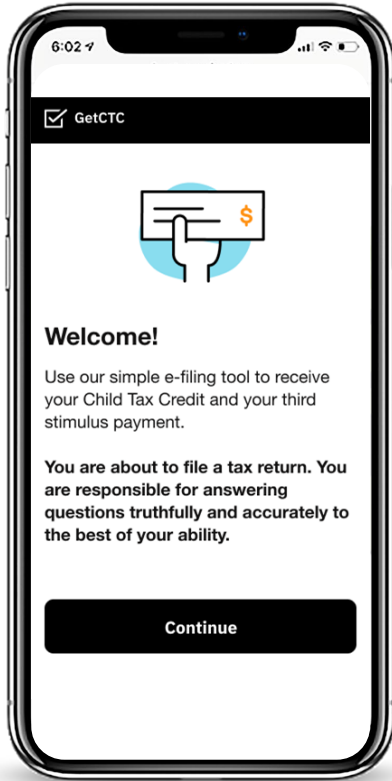
- [Accessible Forms & Publications](#)
- [IRS ASL Videos](#)
- [Disability Related Products](#)
- [More Information for People with Disabilities](#)

# GetCTC.org/NDI

## Simplified Filing Tool for Child Tax Credit and Third Stimulus Payment

Best option for most clients who have not yet filed.

- For low-income households with no filing requirement
- Available in English and Spanish
- Mobile and user-friendly
- Many clients will finish in less than 15 mins
- VITA-certified chat support
- High completion rates - mass outreach can move the needle
- Fed EITC coming in October
- **Open through November 15**



Made in collaboration with the [White House](#) and [U.S. Department of Treasury](#).

# Get CTC Outreach:

With less than **2** weeks to go, we need *your* help!

## Help spread the word:

- Direct outreach is best: text, email, letters, robocalls, etc.
- Display filing options with direct link prominently on your website
- Share at in-person events
- Use existing resources like [this updated outreach toolkit](#) available in 11 languages

## Track your efforts with the use of unique URLs

- Request a url at: [Codeforamerica.org/getctcoutreachpartner](https://codeforamerica.org/getctcoutreachpartner)
- Total returns, amount claimed, returns over time, page visits, certain characteristics of filers
- **VITA programs can utilize # of accepted returns towards grant requirements**

# Additional Resources

- [National Disability Institute's Tax Website](#)
- [CTC Outreach Toolkits](#)

# Q & A



# Upcoming Webinars – all 3:00 PM (ET)

December 1

[VITA Programs: Boost Capacity to Serve Taxpayers with Disabilities](#)

# EVALUATION

**Please complete post-webinar  
evaluation upon sign-off**

# Contact Information

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