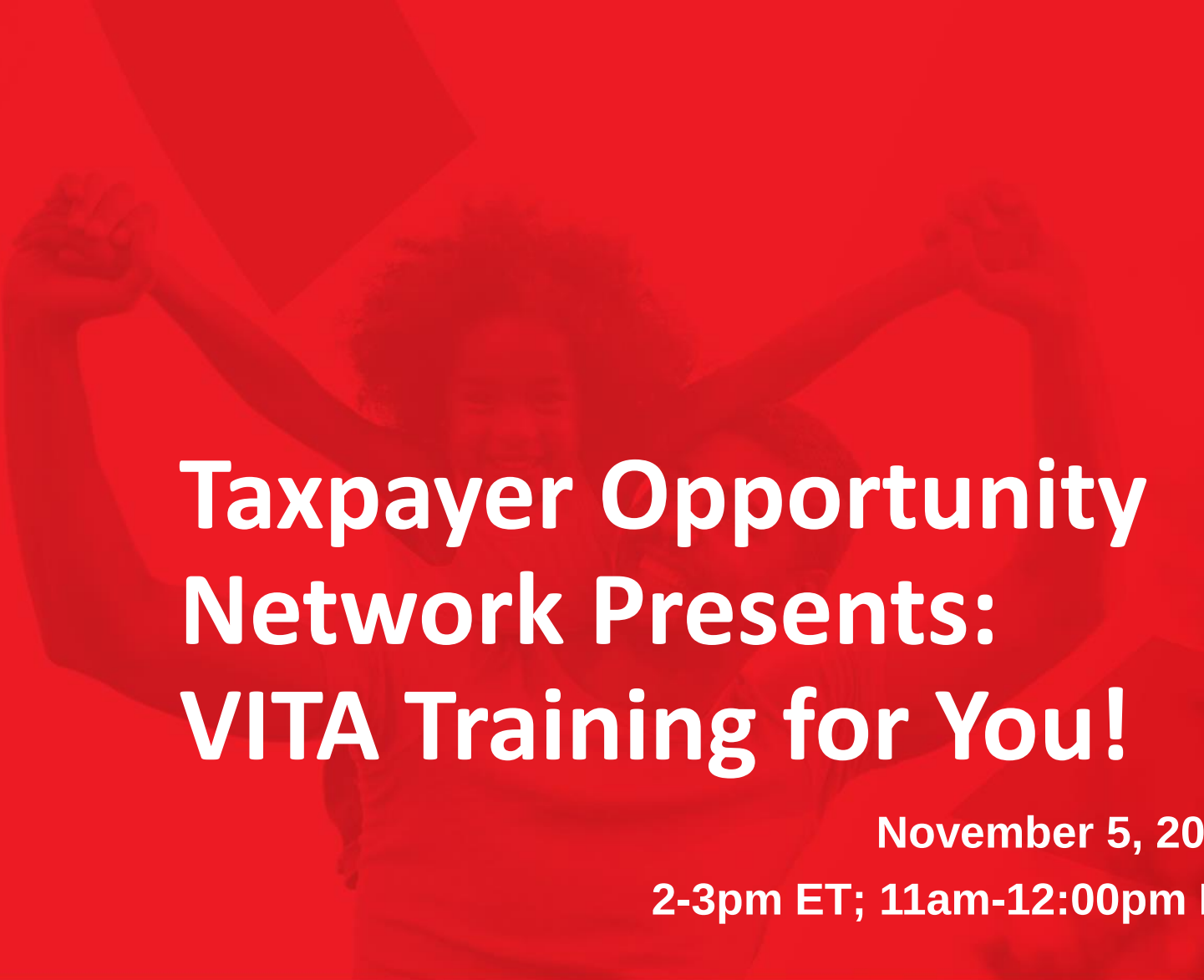




Taxpayer Opportunity Network Presents: VITA Training for You!

November 5, 2018

2-3pm ET; 11am-12:00pm PT



TAXPAYER OPPORTUNITY NETWORK

@ProsperityNow
prosperitynow.org

Welcome



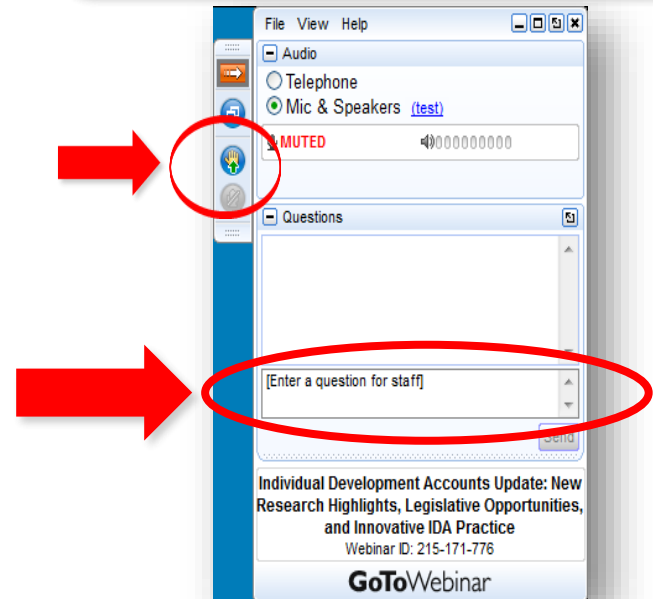
Carmen Shorter

Senior Manager for Learning, Field Engagement
Prosperity Now

Housekeeping

- All webinar attendees are muted to ensure sound quality. Be sure to use the dial-in number and your **audio PIN**.
 - To be **unmuted** and join the conversation click the “Raise Hand” icon and we will unmute you.
- **Ask a question any time** by typing the question into the text box of the GoToWebinar Control Panel.
- If you experience any technical issues, email gotomeeting@prosperitynow.org.

Trouble dialing in?
Just listen through your computer with speakers or headphones!



Keys to Success on Today's Webinar

- Join from a **quiet space**
- Grab a **coffee** or snack and **settle in**
- **Engage!** Share your **comments** with us!
- Create a **watch party** with your team to **debrief** and **discuss** together





Who We Are

Prosperity Now's mission is to ensure everyone in our country has a clear path to financial stability, wealth and prosperity.

PROSPERITYNOW

TAXPAYER OPPORTUNITY NETWORK

To **connect, strengthen** and **inspire** community tax programs so that they can ...

- ✓ More effectively & efficiently **deliver critical tax assistance**
- ✓ Couple that assistance with other **financial capability services**
- ✓ **Advocate for fairer tax policy**

Taxpayer Opportunity Network Members...

- Participate in learning and advocacy opportunities
- Learn about the latest developments in the field
- Access valuable resources for volunteers, program managers and site coordinators
- Get discounts to Prosperity Now and Taxpayer Opportunity Network events

To join or learn more, go to:

prosperitynow.org/get-involved/taxpayer-opportunity-network

What's in store for today?

- Welcome from Capital One
- Welcome from TON
- Building the Platform
- Practitioner Involvement and Process
- Training Demo
- Close

Today's Speakers



Kim Allman

*Senior Director of Community
Development Banking
Capital One*



Rebecca Thompson

*Program Director
Taxpayer Opportunity Network*

Today's Speakers



Barbara DelBene

Consultant

Taxpayer Opportunity Network



Pennie Clayton

*VITA Coordinator,
Community Investment
United Way of
Tarrant County*



Justin Chu

*Senior Program Associate,
Field Engagement
Prosperity Now*

Welcome from Capital One



Kim Allman

Senior Director of Community Development
Banking
Capital One

Welcome from TON



Rebecca Thompson

Project Director, Taxpayer Opportunity Network
Prosperity Now

Special Thanks to the Volunteer Management Working Group



United Way
of Tarrant County



LADDER UP

UNIVERSITY OF MISSOURI
U Extension



United Way
of Southwest Alabama



of Greater Cincinnati



United Way of King County



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Special Thanks to the Volunteer Management Working Group

Member Name	Member Organization
Amanda Hanson	Midwest Minnesota Community Development Corporation
Brad Martin	United Way of Southwest Alabama
Emily Vyhnanek	United Way of King County
Gwen Moore	Foundation Communities
Jonathan Barnes	Campaign for Working Families
Kelly Quicksell	Prepare + Prosper
Pennie Clayton	United Way of Tarrant County
Sharon Knowles	We Speak Tax!
Jennifer Lambert	Go Ladder Up
Liz Brooks-Zak	Center for Economic Progress
Keith Gehring	United Way of Greater Cincinnati
Paj Kane	Jefferson Economic Development Institute
Shatomi Luster	University of Missouri Extension

Thanks a TON

- Brad Martin, United Way of Southwest Alabama
 - Dear Iris
- Jennifer Wilson, Texas Tech University
 - Class Project



TEAMWORK makes
the dream
WORK.

Developing the Training



Barbara DelBene

Consultant, Taxpayer Opportunity Network
Prosperity Now

Developing the Training

- Experience with VITA
- Experience with online training:
 - CEP
 - TON
- Online training is not a substitute for personal interaction

Working Group Involvement



Pennie Clayton

VITA Coordinator, Community Investment
United Way of Tarrant County

Volunteer Management Working Group

- Year-Long Project
- Monthly Meetings
- Input on Criteria
- Input on Training Modules
- Volunteers developed curriculum
- Reviewed Curriculum

Decision Criteria – Online Platform

- **Embeddable (3 votes)**
- **Portable (2 votes)**
- **Video capability (3 votes)**
- **No separate username/password (2 votes)**
- **Tracking & reporting capabilities (4 votes)**
- **Accessible by largest # of users (3 votes)**
- **Budget-friendly (4 votes)**
- **Flexibility for content updates/changes (4 votes)**
- **Allows for Interactive Lessons (3 votes)**
- **Accessible for persons with disabilities (5 votes)**

Decision Criteria - Content

- **Modular (broken down by section/topic) (5 votes)**
- **Tax law modules for returning volunteers (4 votes)**
- Modules for soft-skill development (1 vote)
- **Interactive (3 votes)**
- Module for trainers (0 votes)
- National perspective – focus on federal returns (not software specific) (2 votes)
- Supplemental materials & practice problems (2 votes)

Volunteer Project Demo



Justin Chu

Senior Program Associate, Field Engagement
Prosperity Now

Twelve Modules to Help You

- Intake, Interview and Quality Review
- Filing status & Dependency
- Income
- Adjustments
- Deductions
- Nonrefundable Credits
- Refundable Credits: EITC
- Education
- Affordable Care Act
- Finishing the Return
- Talking to Taxpayers
- Returning Volunteers



ALL ABOARD THE VITA-TRAIN!

Sponsored by Capital One, this training is:

- totally free
- easy to incorporate into your training
- complete with download and embed capability
- designed to get volunteers through IRS VITA Basic Certification

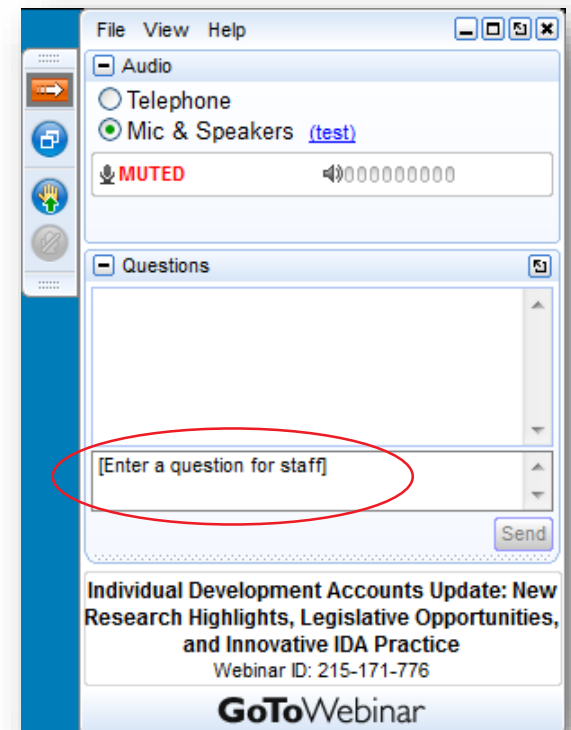
 **Capital One**
INVESTING for Good

PROSPERITYNOW
TAXPAYER OPPORTUNITY NETWORK

Q & A

What questions do you have?

*Share them in the
Questions box!*

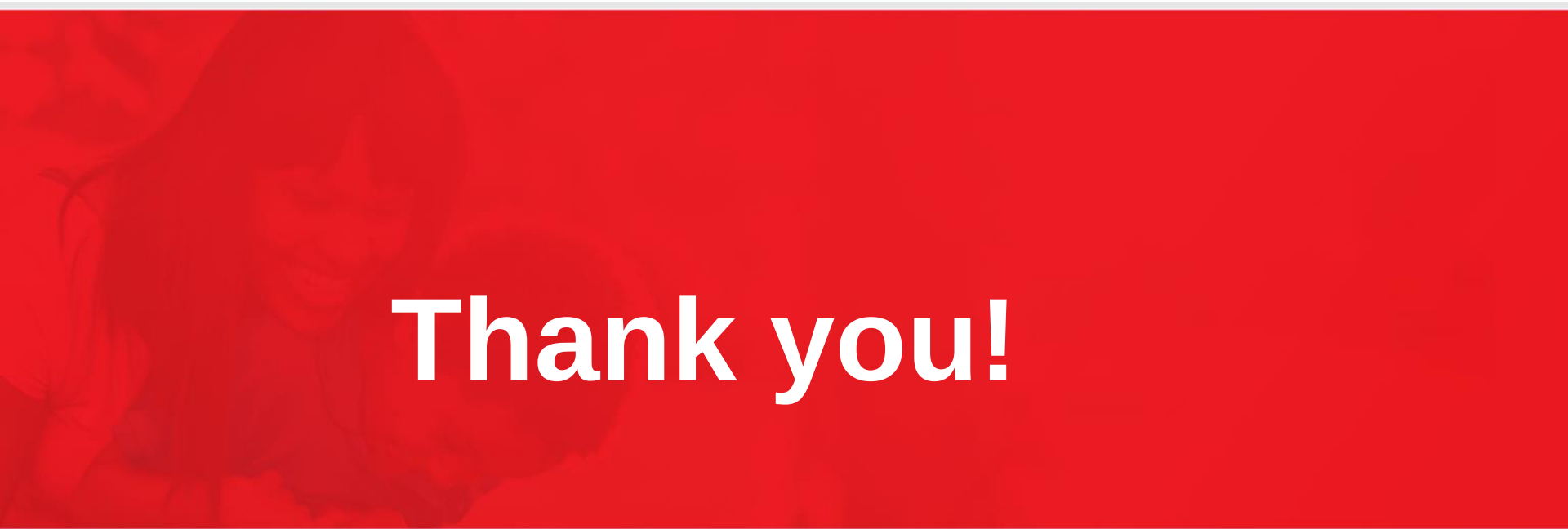


Keep The Conversation Going!

- Join the Tax Roundtable listserv
 - Search “Tax Roundtable listserv”
- Join the Taxpayer Opportunity Network to receive the latest updates from the field
- Email us with any questions, future learning suggestions, and other feedback at taxpayeropportunity@prosperitynow.org
- Remember to vote!

To join or learn more, go to:

prosperitynow.org/get-involved/taxpayer-opportunity-network



Thank you!