



# **Volunteer Income Tax Assistance (VITA) High School Symposium**



## **SPEC MISSION STATEMENT**

Assist taxpayers in satisfying their tax responsibilities by building and maintaining partnerships with key stakeholders, seeking to create a shared value by informing, educating and communicating with our shared customers.





## High School

Enriching educational experiences using Volunteer Income Tax Assistance (VITA)

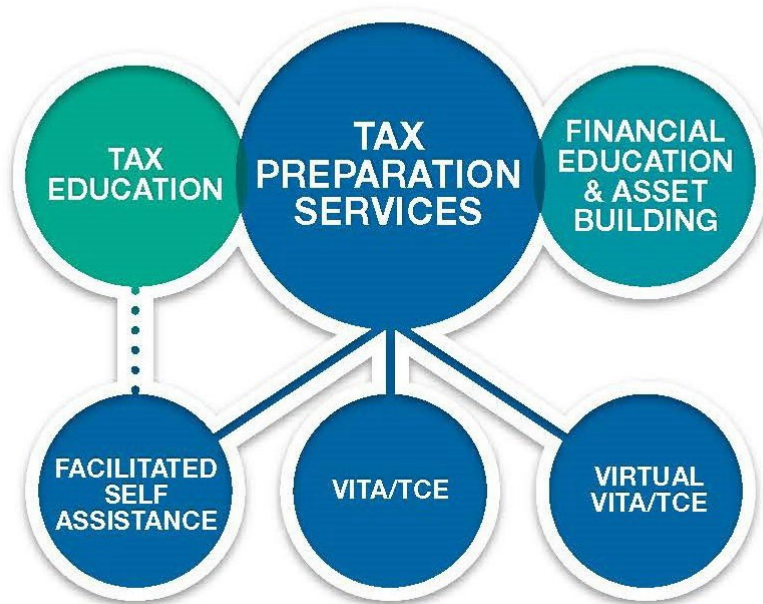






# SPEC Business Model

## SPEC Business Model



## WHY WE DO IT

Taxes serve as the starting point for a dream leading to stronger financial security.

- Assist underserved communities
- Educate taxpayers on tax credits and deductions for which they qualify
- Offer free tax preparation for people with low to moderate income
- Assist taxpayers in building financial security



# VITA Programs

**Traditional VITA** - IRS-certified volunteer prepares electronically filed returns face-to-face with taxpayers at a designated location.



## Volunteer/Student Wins

- Give back and feel connected to your community
- Learn life-long skills

**Facilitated Self-Assistance (FSA)** - FSA empowers the taxpayer to prepare their own return. In this program, the volunteer acts as a tax coach or “facilitator”, answering the taxpayer’s in-scope questions during the process of completing and filing the return.



## Community Wins

- Tax dollars spent locally help local businesses and the community
- Financially stronger households



## VITA Programs cont.

**Virtual VITA** - Provides free tax preparation services in a virtual environment to taxpayers in more remote locations of the country and any site where face-to-face activities are not used during the tax preparation process.



### Taxpayer/Employee Wins

- Tax return prepared for free and filed accurately
- Access to resources to increase financial stability

**Drop-off** - The taxpayer visits the drop-off Site and leaves their supporting documents with the volunteer for their return to be prepared in their absence. Documents are stored securely, and the taxpayer returns to authorize e-filing of the return and retrieve their documents.

*Together we can reach eligible taxpayers  
and have a significant economic impact on  
our communities!*



# Why High Schools

*Secondary Schools Present a Unique Opportunity*

- Support a diverse population
- Provide a continuous source of volunteers
- VITA fulfills the possible mandate of financial education in the curriculum
- Educational facilities are ADA compliant
- Schools generally have support staff in place to facilitate a wide variety of needs

**Approximately 35,000 High Schools across the United States**



# High School Statistics

- Currently 121 high schools in the US offer VITA services to their community
- Approximately 14,000 tax returns were prepared by high school students
- \$13,460,078 in tax credits were injected back into the community
- \$20,348,147 in refunds were created by high school students and returned to the community
- An estimated \$2,148,750 (average cost per return is \$150) in tax preparation fees were saved



“The VITA Program has provided a critical, practical application of the classroom experience, for our Accounting students. Students gain lifelong tax knowledge, serve the community and develop their interpersonal skills. This experience will last a lifetime and the customers have received excellent attention to detail, while saving valuable money.”

*Chris V.D.  
Rancho Cucamonga High School*



# Benefits of VITA Partnerships

## Student Business Acumen and Social Skills

- Increase knowledge of tax law
- Acquire/improve business acumen
- Enrich school experience by participating
- Build Resumé
- Build confidence and leadership
- Provide academic and professional development
- Earn community service hours

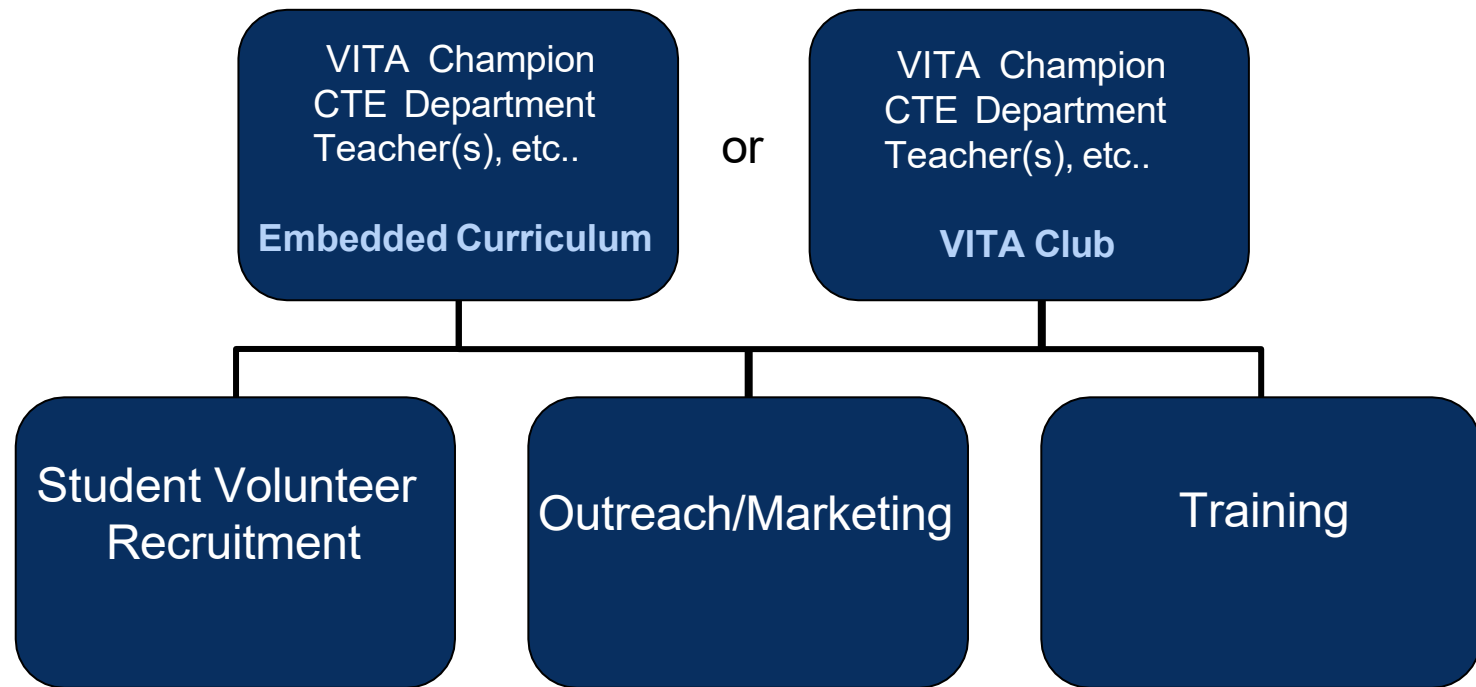
## Recognition as a Community Partner

- Brings financial resources into the community
- Provides student and employee financial education benefits
- Promotes servant leadership
- Personal development for staff and students



# Program Infrastructure

## High School VITA - Suggested Infrastructure



## Site Coordinator

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1. Review VITA/TCE Volunteer Site Coordinator Handbook along with the Privacy Confidentiality and Civil Rights
2. Identify Quality Site Requirements & Volunteer Standards of Conduct
3. Establish roles and responsibilities
4. Follow Start-Up Checklist
5. Identify steps for Intake, Interview and Quality Review
6. Share updates and changes

## Training Coordinator

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- Help find a computer room that will hold the student volunteers
- Work with your SPEC relationship manager on training materials needed
- Teacher(s) serve as tax law and TaxSlayer software instructor(s)





# VITA Educational Opportunities

## Course Study

Example of a VITA Syllabus

Week 1 Aug. (Tax Intro)

Introduction to class

Ice breaker & class procedures

Basic Tax Model

Week 2 Sept. (Getting hired,  
understanding why/when employers pull  
tax)

Resume building

Application completion

Mock Interviews and I-9/W4 forms

Week 3 Sept. (Understanding taxes)

Link and learn Modules 1-5

Changes to the 20xx tax return process

Weeks [xx] (Prepare Taxes)

## Resources

[Link & Learn - Home](#)

[TaxSlayer Practice](#)

VITA is flexible enough to be incorporated as a business class for educational requirements, (MBA, DECA, VITA Club), or as an afterschool program.





## Timeline of Events

# TIMELINE OF EVENTS





# Building A VITA Program

## Marketing-CTE or Instructor

Develops methods to deliver free tax assistance messages to the community.

- School or district website
- Banners on school buses
- Electronic & physical banners at high school
- Robo calls
- Student developed public service announcements
- Social media accounts

## VITA Club

Instructor sets up club.

DECA – MBA – VITA Courses



*“The Accounting students that participate gain IRS certification, an opportunity to use their skills, build their resume and serve their community”*



# Get Involved

## YOU CAN GET INVOLVED

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SPEC partners support the program through:

- Sponsorship of a VITA tax preparation site at the school
- Provide student volunteers at local VITA site
- Adopt and link a Facilitated Self-Assistance site to the school web page
- Provide site space and other resources such as computers and printers
- Advertising sites and free assistance to students, staff, faculty and community members



# *High School Symposium*

The Stakeholder Partnerships, Education and Communication division of the IRS embodies the spirit of Volunteer Income Tax Assistance (VITA) by expanding free tax preparation through high school and college partnerships. Our focus is to provide access to free tax assistance and education to qualified taxpayers and support the educational growth of our young adults.



# VITA







## Join our Cause

**A solid education combined with tax understanding can serve as the starting point for building a strong financial dream. Give back to your community through free tax preparation and prepare students with career ready skills.**

**Bring VITA Into Your  
Community!**



## Area Contact Information

**[TS.VITA.TCE.Growth107@irs.gov](mailto:TS.VITA.TCE.Growth107@irs.gov)**: MD, DC, NJ, DE, VA, TN, WV, KY, NC, SC

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