



# Credit Union Volunteer Recruitment Guide 2011-2012 Tax Season



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## Introduction

Thank you for hosting a VITA site at your credit union. By hosting a site, your credit union is providing another valuable service to members and exemplifying the credit union difference to its community!

Over the past six years, Montana Credit Unions for Community Development (MCUCD) has worked with 24 credit unions and almost 60 volunteers all over Montana to create and sustain VITA programs in their respective communities. During this time, one thing we have learned is that local community members are much more effective in recruiting volunteers in their own communities than we are. Potential VITA volunteers are more comfortable making first contact with familiar faces rather than calling a 1-800 number to talk to me! I know I am not that scary to talk to, but when a potential volunteer is unsure about a project to work on, it is certainly more reassuring to talk to a face rather than into a phone.

With this in mind, we've developed this guide to provide staff at credit unions with the resources to recruit volunteers within your membership and from the community to volunteer as tax preparers at your VITA site. Included in this guide are recruitment tips, staff talking points, an overview of the tax season, and the tax training schedule. This information is designed to give staff the appropriate knowledge to pass along to any potential recruits.

I know VITA is an added task to your everyday job. We at MCUCD really appreciate that you're going above and beyond not only to help out your members, but to provide a unique and money-saving service to those in your community.

Thank you!

Rachael Milne, VITA Program Manager

## VITA Overview

VITA stands for Volunteer Income Tax Assistance. VITA is an IRS-sponsored program that provides free tax preparation to people who make less than \$50,000/year and have fairly straightforward tax returns. Volunteers are trained with IRS materials to prepare taxes and are certified by taking a test.

Set a goal for your credit union to recruit at least two volunteers. At MCUCD, we have found that half the volunteers actually follow through with the training. With that said, most credit union VITA sites have one dedicated volunteer who volunteers when their schedule allows.

This overview of the tax season includes the volunteer orientation, the volunteer's schedule, the tax appointment, and the quality review process. Familiarity with the overview of the tax season allows staff to better explain expectations to potential volunteers.

**Volunteer Recruitment:** Volunteer recruitment usually begins in September and October. In September, MCUCD sends out order forms for volunteer recruitment and MontanaFreeFile.org promotional newsletter articles, lobby posters, and inserts. It is highly recommended for credit unions with VITA programs to order these materials for their credit unions.

MCUCD also handles volunteer referrals during this time. When a potential volunteer contacts your credit union please send their contact information to [Rachael](#) so she can introduce herself, register them for training, and answer any questions or concerns.

**Volunteer Training:** MCUCD hosts volunteer training from October until January. A training schedule is included in this guide.



Theresa at High Peaks FCU in Dillon completes a tax return for a community member.

**Volunteer Orientation:** Prior to the beginning of the tax season, orient your new volunteer to the credit union by introducing them to staff and showing them their workspace. The orientation is a great time to decide on the volunteer's schedule.

**Volunteer Schedule:** During tax season, the volunteer will regularly prepare taxes during their scheduled time. It is important to keep the volunteer apprised of their schedule—volunteers like to stay busy preparing tax returns while onsite. Appointments last for about an hour depending on the volunteers' experience and comfort level.

**Tax Appointment:** The taxpayer should arrive to their appointment with a completed intake and interview and their necessary tax documents (W-2s, 1099s, etc). The volunteer will use all of this information to prepare the tax return.

**Quality Review Process:** When the volunteer completes the tax return, with the taxpayer in the office, the volunteer will call an MCUCD Quality Reviewer for Quality Review. The Quality Review Process is required by the IRS and provides a check over the return to ensure there are no mistakes and to make any corrections. When the Quality Review is complete, the volunteer will print out the return for the taxpayer and retain the necessary documents to be mailed to MCUCD.

## Staff Talking Points

Here are some points to focus on when talking to potential volunteers:

1. Volunteering at a VITA site is a meaningful way for volunteers to help families and individuals in the community save money to receive the most of their tax return. Volunteers are trained to get taxpayers the refund they deserve!
2. Last year, MCUCD Volunteers at local credit unions throughout MT prepared over 2000 returns returned \$1.9 million back to Montanans. *If you hosted a tax site last year, it may be helpful to include your statistics. Ask [Rachael](#) if you do not have your statistics.*
3. As a part of participation, volunteers gain knowledge of individual income tax preparation and have the ability to prepare their own return.
4. MCUCD provides extensive support to volunteers at credit union sites, including technical and tax law assistance over the phone and web.



Sue Smith, CEO at Ravalli County FCU, chats with their VITA volunteer, Theresa.

## Tips for Volunteer Recruitment

When talking to potential volunteers, here are some additional tips to keep in mind.

- Instead of saying VITA, say “free tax preparation,” or “volunteer tax preparation.” VITA is the IRS acronym and may be unfamiliar to most people working outside the program.
- Face-to-face contact with potential volunteers is most effective for recruitment. It is proven that people are more likely to volunteer if they are asked by someone they know!
- Emphasize the many training opportunities--there are many options for many schedules. Please see the MCUCD Training Schedule for more information.
- Emphasize the extensive level of support during tax season: a volunteer at a credit union is not alone while doing taxes! The MCUCD Tax Team provides extensive support. Volunteers can call with questions before, after and during the tax season. A Tax Team Member is always available to assist a volunteer.
- Personalize your experience with the VITA program. Encourage people to participate by sharing your enthusiasm or stories of how the program has touched members!
- Focus on the local aspect—volunteers will be helping neighbors and fellow community members.

- Finally, talk about the incentives VITA volunteers receive:
  - Meet new people
  - Get out and active during the winter
  - Learn how to prepare income tax returns
  - Ability to prepare their own and family's tax return

## What makes a great VITA Volunteer?

People think retired CPAs and accountants make the best VITA volunteers, and rightfully so. These folks are a great starting point when recruiting volunteers because they may have experience with tax preparation and are very detail orientated. Both are great traits for VITA volunteers! However, tax preparation experience is not crucial for a potential VITA volunteer! There are other traits that make great VITA volunteers:

- A willingness to learn
- Customer service skills/friendliness
- Basic computer literacy
- Attention to detail
- Interest in helping community members



Barb (on the left), a community volunteer in Northeastern MT, works with a tax client at a clinic sponsored by Richland FCU in Culbertson

Many of our VITA volunteers are not CPAs or accountants. In fact, our volunteers come from a wide array of backgrounds! Here are some examples of our volunteers from around the state:

- Matt, Butte, Ranch-hand
- Lyndia, Laurel, SEG FCU Board Chair
- Peggy, Fort Benton, Nurse
- Debbie, Havre, Librarian
- Clair, Deer Lodge, Retired Teacher

## Where are great VITA Volunteers?

When recruiting volunteers, places to start include:

**Local Media:** If your credit union advertises with the local media, consider asking them to run a PSA for VITA volunteer recruitment. PSAs are included in this guide!

**Local Partners:** If your credit union has a relationship with local nonprofits and other businesses, consider asking for their help in recruiting VITA volunteers. Ask them to hang posters in their lobbies or make announcements at their staff meetings and in newsletters/bulletins.

**Membership:** Recruit from within your membership. It is a great way to get your members involved with their financial institution! Newsletter article, inserts, and lobby

posters are available. Contact [Rachael](#) for more information. Your reader board is another great place to solicit potential volunteers.



Mike and Lyndia (SEG FCU Board Chair) volunteer at SEG FCU.

**Credit Union staff:** Staff at your credit union is a wonderful resource to recruit volunteers. They can nudge their friends and family to volunteer at the VITA site. Mention the need for VITA volunteers at your next staff meeting and challenge staff members to recruit volunteers.

Staff also makes great volunteers. If your credit union can afford to donate a staff person to volunteer as a tax preparer, consider utilizing him or her to prepare tax returns through the

VITA program.

**Board Members:** Mention the need for volunteers at your next board meeting. Board members make great volunteers! Or task board members to recruit volunteers through their community connections.

**Clubs/Community Organizations:** If you, a board member, or any of your staff is a member of a club or professional organization within the community, consider mentioning the volunteer opportunity at the next meeting.

**Universities/Community Colleges:** If a university or community college campus is nearby, consider contacting the accounting or business department to recruit volunteers or interns. For internships, contact [Rachael](#) for a position description and more information.

## What does MCUCD do to help you recruit volunteers?

MCUCD works to help you recruit volunteers within your community! We provide you with marketing and support throughout the recruitment process. Please contact [Rachael](#) with any questions about recruitment!

After you have recruited a volunteer, please send their contact information to [Rachael](#). She will follow up with the volunteer to explain the program, talk about the upcoming tax trainings, and answer any questions or concerns the volunteer may have.

From there, the volunteer's information is entered into MCUCD's Volunteer Database, which allows us to track and contact volunteers.



## Conclusion

Thank you so much for your dedication and help in recruiting tax preparers in your community! You never know who will respond to a request from a friend, a newspaper PSA, an announcement at church, or even a poster at the library. We know that VITA is a wonderful program, and as sponsors and volunteers you are the best people to help keep this program thriving for years to come.

Thank you!

Rachael Milne, VITA Program Manager  
Montana Credit Unions for Community Development  
. . . the charitable arm of the Montana CU Network  
101 North Rodney \* Helena, MT 59601 \* 800.745.5546 x142

*Montana Credit Unions for Community Development is a charitable 501(c)(3) nonprofit organization with a mission to implement programs through Montana Credit Unions that improve the social and economic well-being of Montanans.*

## MCUCD Tax Training Schedule

**The Tax Tele-Course:** The Tax Tele-Course is a series of tax law trainings conducted over the phone and designed to teach volunteers how to prepare taxes at free tax sites across the state of Montana. The curriculum is based on IRS VITA training materials with each session lasting about an hour. Each session is recorded and archived at [www.MontanaFreeFile.org](http://www.MontanaFreeFile.org) for participants to listen to as many times as they want.



**October Tele-Course:** This Tele-Course will cover last tax season’s materials. Because tax law changes minimally from year to year, this is a great introduction for new volunteers.

2011 October Tax Tele-Course								
Presented by Montana Credit Unions for Community Development								
The Tele-Course will be held from 9-10am on the following days:								
Mon Oct 17 <sup>th</sup>	Wed Oct 19 <sup>th</sup>	Mon Oct 24 <sup>th</sup>	Wed Oct 26 <sup>th</sup>	Mon Oct 31 <sup>st</sup>	Wed Nov 2 <sup>nd</sup>	Mon Nov 7 <sup>th</sup>	Mon Nov 14 <sup>th</sup>	Wed Nov 16 <sup>th</sup>
Program Overview	Exemptions	Income	Adjustments	Deductions	Non-refundable Credits	Refundable Credits	MT Form 2, Part I	MT Form 2, Part II

**December Tele-Course**—This Tele-Course will cover the 2011-2012 tax season materials. *Dates are tentative, based on IRS release of new materials.*

2011 December Tax Tele-Course									
Presented by Montana Credit Unions for Community Development									
The Tele-Course will be held from 9-10am on the following days:									
Wed Nov 30 <sup>th</sup>	Fri Dec 2 <sup>nd</sup>	Mon Dec 5 <sup>th</sup>	Wed Dec 7 <sup>th</sup>	Fri Dec 9 <sup>th</sup>	Mon Dec 12 <sup>th</sup>	Wed Dec 14 <sup>th</sup>	Fri Dec 16 <sup>th</sup>	Mon Dec 19 <sup>th</sup>	Tues Dec 20 <sup>th</sup>
Program Overview	Exemptions	Income	Adjustments	Deductions	Non-refundable Credits	Refundable Credits	Optional—Advance Topics	MT Form 2, Part I	MT Form 2, Part II

**TaxWise Online Training:** This training is devoted solely to using the software we will use when preparing taxes onsite. Will be held Tuesday, January 10<sup>th</sup>, 10am-11:30am

\* To sign up for the Tele-Course or any other trainings, contact [Rachael](mailto:Rachael@mcucd.org) at 1-800-745-5546 ext 142.

**Other Training Opportunities:** There are more training opportunities for VITA volunteers other than what MCUCD offers.

- **Link & Learn:** The IRS-sponsored online tax preparer training. This training is completely online and best-suited for independent learners. Visit <http://www.irs.gov/app/vita/> to get started.
- **Classroom Trainings:** Classroom trainings are offered in most major cities in Montana. Visit [www.MontanaFreeFile.org](http://www.MontanaFreeFile.org) to find out how to register for training in your region.

**Credit Union Site Coordinator Training:** All site coordinators are required to attend this training. Topics covered will include day-to-day VITA items as well as IRS-required materials.

1. Monday, January 9<sup>th</sup>, 9am-10am

**Quality Review Training:** This training is designated for volunteers who will provide over-the-phone support and quality review to volunteer tax preparers. Volunteer tax preparation experience and Advance Certification is necessary to become a Quality Reviewer.

1. Thursday, January 12<sup>th</sup>, 10am-11:30am

**VITA Site Orientation Call:** MCUCD will hold several calls before tax season begins to provide an orientation to volunteers. Volunteers will be required to attend only one of the calls. Dates and times will be released as tax season draws nearer.

To sign up for the Tele-Course or any other trainings, contact [Rachael](#) at 1-800-745-5546 ext 142.

## Press Packet

### Newsletter Article:

Are you looking for a volunteer opportunity in your community? Would you like to see firsthand how **{Credit Union}** works to serve the **{Location}** community?

Montana Credit Unions for Community Development (MCUCD) and **{Credit Union}** are teaming up to support a Volunteer Income Tax Assistance (VITA) site at **{Site Location}**, and we are now accepting applications for volunteers and training registration!

The VITA Program offers free tax help to individuals and families with low-to-moderate income (generally, \$50,000 and below) who cannot prepare their own tax returns. With our FREE training, you become an IRS-Certified volunteer, and help prepare basic tax returns.

VITA volunteers at **{Credit Union}** receive FREE training and extensive volunteer support from MCUCD before, during, and after tax season. MCUCD provides comprehensive training to all volunteers and is always available for questions over the phone while the volunteer is working on a tax return. We will be there to support you, every step of the way!

Best of all, volunteers can choose the FREE training option that suits them best. MCUCD conducts over-the-phone Tax TeleCourse training series twice before the tax season begins. Each of the eight TeleCourse sessions lasts about an hour, with a homework assignment to help you practice what you've learned. Our first session begins **{VITA TeleCourse Start Date}**. Classroom training may be available in **{Region}**. Visit [www.MontanaFreeFile.org](http://www.MontanaFreeFile.org) for more information. For those who like online learning, volunteers can use the IRS Link & Learn Training Module. Visit [www.irs.gov](http://www.irs.gov) and type in the keyword Link & Learn.

MCUCD has supported VITA sites since 2006 and has experience working with volunteers and taxes state-wide. ***Last year, 52 volunteers prepared 2,046 tax returns at sites across the state, returning \$1,930,909 to hard working Montanans!*** For more information on MCUCD, visit [www.MontanaCreditUnions.coop](http://www.MontanaCreditUnions.coop).

If you or someone you know is interested in volunteering at a VITA site for this coming tax season, please contact Rachael Milne at [rachael@mcun.org](mailto:rachael@mcun.org) or 1-800-745-5546 ext. 142. VITA is a great way to learn something new, help Montanans get ahead financially, and get more involved with **{Credit Union}**! We hope to hear from you soon!

**Public Service Announcement/Press Release:**

Public Service Announcement/Press Release  
For Immediate Release  
{Date}

**For more information, contact:**  
**CREDIT UNION**  
**Site Coordinator Name**  
**Address**  
**Phone**  
**Email**

**Serve your community as a VOLUNTEER TAX PREPARER- No Experience Required**

Are you interested in learning how to prepare basic tax returns? Do you have some time to volunteer during the upcoming tax season to help those in your community?

Serve your community as a volunteer tax preparer!

Currently, {CREDIT UNION} is recruiting volunteers to prepare tax returns for low-to moderate means families in {REGION} through the Volunteer Income Tax Assistance program (VITA).

Make a REAL difference for your community! Last year, volunteers prepared at {CREDIT UNION} prepared {Number} of tax returns at sites across, returning {\$\$\$} to hard working Montanans!

NO Professional Experience Required! All volunteers receive *FREE* and flexible training to become IRS certified, with support provided before, during, and after tax season!

If you have been looking for a meaningful way to give back to your community – look no further! Call {SITE COORDINATOR} at {CREDIT UNION} today to sign up to volunteer as a tax preparer.

To learn more about volunteering a free tax site at {CREDIT UNION}, please visit [www.MontanaFreeFile.org](http://www.MontanaFreeFile.org) or call {Site Coordinator}.

## Sample Bulletin Newsletter Announcement

Serve YOUR Community! **CREDIT UNION OR ORGANIZATION** is currently looking for **VOLUNTEER TAX PREPARERS!** No previous tax-filing experience is needed, just a willingness to learn! Learn to file basic returns and help hard-working Montanans get the refunds they deserve. We offer many different training opportunities and extensive support throughout the tax season. If you are interested in volunteering or if you have questions, please contact **NAME** at **CREDIT UNION OR ORGANIZATION** at **E-MAIL** or **PHONE NUMBER**.

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## Sample Radio PSA

### Volunteer Tax Preparer Recruitment

Want to stay busy this winter and serve your community? **CREDIT UNION OR ORGANIZATION** is looking for volunteer tax preparers. No previous tax filing experience necessary, just a willingness to learn!

We will train and certify you to prepare basic tax returns and help hard-working, low-income Montanans claim the refunds they need and deserve! Learn a valuable skill, serve the community and stay busy! For more information please call **NAME** at **CREDIT UNION OR ORGANIZATION** at **PHONE NUMBER**.