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Volunteer Income Tax Assistance (VITA) Program

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Volunteer Income Tax Assistance (VITA) Program



Prepare Taxes and Make a Difference

Susanna Beachy, Raye Lynne Gerber, Jessica Oberle, Dr. Martina Peng, Dr. James Pierson

Abstract

In order to enhance student experiential learning, Franklin University's Department of Accounting, Finance and Economics continued its third year efforts in participating in the Volunteer Income Tax Assistance (VITA) program in 2016, in conjunction with United Way's Tax Time Coalition of Central Ohio and the Internal Revenue Service (IRS). The VITA program prepares free federal and state tax returns for low to moderate income taxpayers in the central Ohio community. During the 2016 tax season, 14 volunteer undergraduate students, alumni and administrative personnel were trained and received IRS certification to serve the community; the efforts of the volunteers in the Franklin University VITA program have served 187 clients and successfully helped these clients claim \$201,807 in refunds; saving them an estimated \$37,400 in preparation fees! Student and alumni volunteers not only had the opportunity to contribute back to the community but also earned hands-on experience working with clients by applying what they have learned in the accounting courses. The poster will demonstrate how Franklin VITA volunteers operated the tax clinic efficiently to give back to the local community and provided the unique experiential learning experience for students.



PHOTO: Student volunteers Jessica Oberle (left in back) and Raye Lynne Gerber (right in back).

Program Goals

The Volunteer Income Tax Assistance (VITA) program can be designed to facilitate an environment of experiential learning for student volunteers for the purpose of gaining practical experience in taxation and providing a needed community service. VITA may seek to achieve the following goals:

- Provide a practice oriented certification process in basic and advanced personal taxation for student volunteers
- Facilitate professional interviews between students and taxpayers
- Provide support for students to analyze varying tax information patterns and complete personal income tax returns for taxpayers
- Enable students to gain taxation skills through practical experience not available in the classroom
- Facilitate educational and professional networking among students and supervisors
- Provide students with an opportunity to improve financial independence and stability in the community

Mission

The Volunteer Income Tax Assistance (VITA) Program assists low-to-moderate income taxpayers in satisfying their tax responsibilities by providing FREE tax return preparation.

Volunteers



PHOTO (pictured, left to right): Toni Duke, Raye Lynne Gerber, Dr. Jim Pierson, Ivy Yang, Dr. Martina Peng, Jessica Oberle, Stacy Dreier-McCathran, Susanna Beachy, and

Data

During the 2016 tax season, volunteers at Franklin VITA site have:

- Served **187** clients
- Helped clients claim **\$201,807** in refunds
- Saved clients an estimated **\$37,400** in tax preparation fees
- **26%** refund increase from last year

Tax Year	Total Served	Total Filed	Federal Total	2015 E-FILE (accepted)	2015 PAPER	Prior Year	Served, Not Filed
2015	187	171	166	159	7	4	16
2014	148	129	127	124	3	2	19

Highlights

- Served 187 clients and successfully helped them claim \$201,807 in refunds; saving them an estimated \$37,400 in preparation fees
- Offered a unique learning experience that gave students the opportunity to apply what they learned in accounting courses to real life situations
- Students gained practical experience in taxation and helped make a difference
- Several accounting positions available for student volunteers



PHOTO: Student volunteers Ivy Yang (middle) and Stacy Dreier-McCathran (right).

Student Experiential Learning

- Gained tax training and certification
- Applied classroom learning to real life situations
- Learned to work with diverse groups of individuals from various socio-economic backgrounds and demonstrated compassion and empathy
- Strengthened relationships with fellow volunteers and the local community
- Career exploration
- Sense of achievement and personal growth
- Enhanced résumé with valuable experience

Volunteer Opportunities

- **Greeter** – Screen taxpayers to determine type of assistance required and confirm that they have the necessary documents
- **Tax Preparer** – Work directly with eligible taxpayers to obtain tax information and prepare tax return using electronic filing software
- **Quality Reviewer** – Review tax returns completed by volunteer tax preparers to ensure that tax returns are error-free and taxpayers have received quality service
- **Site Coordinator** – Assist with any issues that arise in the program, manage volunteer schedules to ensure adequate coverage, maintain needed supplies and equipment at the site



PHOTO (pictured, left to right): Student volunteers Stacy Dreier-McCathran, Susanna Beachy, Raye Lynn Gerber, Jessica Oberle, and Ivy Yang.

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Resources

- IRS Tax Volunteers. (2015). IRS.gov. Retrieved from <https://www.irs.gov/individuals/choose-your-tax-volunteer-role>
- Tax Time Join Our Team. (2016). Taxtimecentralohio.org. Retrieved from <http://taxtimecentralohio.org/volunteer/join-our-team>