



ANNUAL REGIONAL CONFERENCE

PRESERVATION PARK, OAKLAND

NOVEMBER 8, 2016

Topic	Presenter
Registration and Breakfast	
Welcome	<i>Kelly Batson, UWBA</i>
Power of 8	<i>Gezche Graves and Kat Russo, UWBA</i>
Path Act Updates	<i>Patrick Brown, IRS</i>
Break	
CA EITC Outreach Efforts <ul style="list-style-type: none"> • <i>Overview & First Year Results</i> • <i>Grant Efforts</i> • <i>High Need Areas</i> • <i>Outreach Tools/Materials</i> 	<i>Chris Smith, FTB</i> <i>Vanessa Muñiz, UWBA</i> <i>Benson Lai, UWBA</i>
LUNCH	
VITA Site Tools <ul style="list-style-type: none"> • <i>Self-Service Riverstar</i> • <i>MyFreeTaxes</i> • <i>My Benefits Kitchen</i> 	<i>Nalleli Sandoval, UWCA</i>
Innovation Breakouts – First Round <ul style="list-style-type: none"> • <i>Elected Official VITA Sites</i> • <i>Contra Costa County CalWORKs Pilot</i> • <i>One Day Event @ Lundy Post Office</i> • <i>Savings Initiative</i> 	<i>Alameda County Social Services Agency</i> <i>Contra Costa County EHSD</i> <i>Gezche Graves and Benson Lai, UWBA</i>

	<i>Laura Freeze, UWBA</i>
Break	
Innovation Breakouts – Second Round	<i>Various</i>
TaxSlayer & Quality Review	<i>Raquel Rangel, IRS</i>
Wrap Up & Material Pick Up	

Innovation Breakout Descriptions

Elected Official VITA Sites

Alameda County Social Services Agency (SSA) partners with Supervisor Wilma Chan’s office to offer free tax preparation to constituents and the community. Come learn about how this partnerships came about, how it came to fruition and how you can think about partnering with your local elected officials.

Contra Costa County CalWORKs Pilot

Modeled after San Bernardino County, CalWORKs recipients in Contra Costa County will be trained and certified and PAID to prepare taxes at VITA sites in Contra Costa County. While the 2017 season will be our pilot year, come to learn about the planning efforts and the potential for future years!

One Day Event @ Lundy Post Office

Each year, on Tax Day, the Santa Clara County VITA crew hosts a “Midnight Madness” event at the post office to help over 100 people with their tax returns... during the final hours leading up to the filing deadline! Come to this session to learn about how you can maximize one-day events and leverage the strength of multiple VITA sites and their volunteers.

Savings Initiative

1,300 savers isn’t bad, but there are more potential savers out there! Come to learn about how your fellow VITA sites overcame the common barriers to getting taxpayers to save. You will also learn about some compelling and recent research that makes the case for savings at tax time. You won’t want to miss this chance to jump start your savings planning!