

## VITA/Earn It! Keep It! Save It! Coalition Roles and Responsibilities

IRS	UWBA
<p><b>Planning:</b></p> <ul style="list-style-type: none"> <li>Attend and participate in planning committee(s) and coordinator meetings to get ready for the tax season in person or virtual when possible</li> <li>Analyze site performance and efficiency, make recommendation for improvements for the next season (including potential consolidation, etc.)</li> <li>Work with UWBA to recruit new VITA Sites</li> </ul> <p><b>Marketing:</b></p> <ul style="list-style-type: none"> <li>Identify target populations using IRS data to support UWBA's marketing efforts</li> </ul> <p><b>Site Coordinator/VITA Site Support:</b></p> <ul style="list-style-type: none"> <li>Ensure all Site Coordinators are trained</li> <li>Provide technical assistance to all VITA sites (support with operating the VITA site)</li> <li>Provide equipment for sites on a loan basis</li> <li>Order all site materials and software</li> <li>Support Savings Campaign (FEAB) including providing reports</li> <li>Assist UWBA with development of Site Coordinator Training (New Site Coordinator Training, Regional Conference, etc.)</li> <li>Attend and participate in all VITA Site Coordinator Meetings before and during the tax season <ul style="list-style-type: none"> <li>Agree on and share IRS agenda items for each meeting</li> </ul> </li> <li>Conduct VITA Site visits (in person or remotely) to ensure quality standards and IRS protocol are being followed</li> <li>Communicate with identified underperforming sites to address issues and problem solve to ensure meeting minimum qualifications.</li> <li>Ensure sites' TaxSlayer template is set up, including the form 8888 and other customizations as needed</li> <li>Monitor site performance and Quality Site Requirement adherence</li> <li>Specialty trainings for coordinators such as Married Filing Separately, Non-Resident, Education Credits, etc. as needed</li> <li>Order software with Multi-Site Access for all VITA sites</li> <li>Ensure all VITA Sites provide admin access to TaxSlayer software to the IRS Relationship Managers</li> </ul> <p><b>Volunteer Training/Support:</b></p> <ul style="list-style-type: none"> <li>Order training materials</li> <li>Ensure all Volunteer Training Instructors are trained and prepared</li> <li>Assist UWBA EKS staff in the development of training for volunteers (curriculum, Train the Trainer, etc.)</li> <li>Assist with coordination of volunteer training (logistics and instructors)</li> <li>Assist with volunteer and instructor recruitment</li> </ul> <p><b>Partner/Community Engagement:</b></p> <ul style="list-style-type: none"> <li>Provide informational workshops on tax law changes to community and coalition members (if needed)</li> <li>Identify partnerships for FSA or traditional VITA sites</li> <li>Develop statewide partnerships like Credit Unions, CA Board of Equalization opportunities, and State Controller's office.</li> <li>Identify partnerships for client outreach and growth opportunities</li> <li>Participate in planning and support coalition events</li> </ul>	<p><b>Planning:</b></p> <ul style="list-style-type: none"> <li>Lead regional planning efforts for each tax season- via planning committees or planning days/meetings</li> <li>Work with IRS to recruit new VITA Sites</li> </ul> <p><b>Marketing:</b></p> <ul style="list-style-type: none"> <li>Provide regional marketing materials to sites and coalitions</li> <li>Lead regional public/media relations</li> <li>Client outreach through regional and county based advertising, media relations and partnerships</li> <li>Maintain and improve <a href="http://www.earnitkeepitsaveit.org">www.earnitkeepitsaveit.org</a></li> </ul> <p><b>Site Coordinator/VITA Site Support:</b></p> <ul style="list-style-type: none"> <li>Provide technical assistance to all VITA sites (support with operating the VITA site)</li> <li>Plan and implement site coordinator trainings before and during tax season (New Site Coordinator Training, Regional Conference, etc.) as needed</li> <li>Convene and facilitate monthly coordinator meetings before and during tax season <ul style="list-style-type: none"> <li>Schedule may vary in Santa Clara County</li> </ul> </li> <li>Coordinate savings campaign and provide training/tools to VITA sites</li> <li>Provide resources to sites through a competitive grant application process (resources could include supplies, grant money, equipment, etc.)</li> </ul> <p><b>Volunteer Training/Support:</b></p> <ul style="list-style-type: none"> <li>Coordinate trainings in each county for volunteers</li> <li>Volunteer recruitment, placement and end-of the year volunteer recognition coordination</li> <li>Lead the development and revision of Scenario Based Training in time for November trainings</li> <li>Coordinate the Train the Trainer</li> </ul> <p><b>Coalition Leadership:</b></p> <ul style="list-style-type: none"> <li>Client survey creation, collection and analysis</li> <li>Provide access to 2-1-1 call centers through training of call center staff and acting as Point of Contact</li> <li>Serve as the regional and county coalition representative as needed</li> <li>Share best practices regionally</li> <li>Participate and coordinate advocacy opportunities</li> <li>Fundraise for regional coalition</li> <li>Manage/administer IRS VITA grant</li> <li>Coordinate coalition events as needed</li> </ul>