



## USING ALTERNATIVE COMMUNICATION METHODS AND MULTI-COUNTY PARTNERSHIPS TO ENHANCE EXTENSION OUTREACH: A VIRTUAL VITA EXAMPLE

Heather Janney | 4-H/FCS Extension Agent

**UF** | **IFAS Extension**  
UNIVERSITY of FLORIDA

# VITA: Volunteer Income Tax Assistance

- Administered by the Stakeholder Partnerships Education and Communication Department (SPEC) within the IRS
- Free income tax preparation and filing services for low- and moderate-income households
- The IRS provides publications and educational resources/training for tax preparation and intake sites
- Traditionally intake and preparation occur in same location with trained Site Coordinators and Preparers

# Rural County Struggles

- Volunteers
- Funding
- Resources
- Time
- Involvement

# Fitting VITA into the equation

- Educational opportunities
- Outreach and expansion
- Service for community residents

# How did we end up here?

- 2013: Approached by IRS Senior Tax Consultants for Columbia and Hamilton Counties
- 2014: Columbia and Hamilton again with UWBB
- 2015: UF/IFAS Extension created a central hub preparation site, hired site coordinator, opened to 7 intake sites

# How is it all set up?

- Trainings
- Intake sites (Currently 8 FL and 6 GA)
- Hub site (Leon County)
- IRS Senior Tax Consultants available
- IRS Publications and Posters
- Appointments
- Computer or tablet and internet/WIFI needed

# Site Set Up

Same as any traditional site PLUS

- Scanner or scanning app
- Fax machine (dependent upon sites)
- Dropbox
- Google Calendar/Docs
- Headsets
- Skype or other Video Conferencing

# Conducting a Virtual VITA Appointment

- Consent Form and Identification
- Intake Form
- Scan All Documents and Forms
- Upload to Dropbox
- Connect to Hub Site via Skype
- Introduce Client to Hub Site
- Print Completed Return
- Educational Opportunity
- Client Signature



# Results

- 2012: NO returns from counties involved
- 2013: UWBB and 2 IFAS Intake – 63 returns accepted
- 2014: UWBB and 2 IFAS Intake – 103 returns accepted
- 2015: Leon Hub Site and 7 Intake – 128 accepted electronic returns and five paper filed returns
- 2016: Leon Hub Site and 11 Intake including 4 sites in GA – 210 accepted electronic returns
- 2017: Leon Hub Site and 14 Intake including 6 sites in GA – 433 submitted returns, 91 state returns

# How can this be expanded?

- What areas are you lacking in?
- How can you interact with other sites?
- Where are volunteers most available?
- Can this be used for other programs?

**Is there internet service available?**

# Training for Volunteers/Providers

- Communication with an audience they are not familiar with
- Comfort with technology
- Flexibility
- Knowing sources of help – IT, other

Questions? Comments?