

# Tax Events



## Self-Filing Event

- Group of youth follow the [Self-Filing Guide](#) to complete their taxes on myfreetaxes.org.
- If they get stuck or have questions, VITA volunteers are present to assist.
- Ideal for youth who have some reservations about self-filing on their own but are generally self-sufficient.

## VITA Sub-Site Event

- A local VITA site essentially brings their site to you for a day.
- Youth are assisted one-on-one. VITA volunteers file their taxes.
- Ideal for youth who could benefit from more support.
- Recommended for youth with self-employment income (1099 forms) and/or financial aid which can make for a more complex tax situation.

**VITA = Volunteer Income Tax Assistance**

# Self-Filing & Sub-Site Events: *How-To*



## Partner with local VITA site:

- Use [VITA roster](#) to identify a local site that can send VITA volunteers
- Request their partnership on a “sub-site event” or “self-filing event.”
- Can also consider inviting other partners: e.g. local housing provider, campus support program can send add'l youth/students.

## Extensive outreach:

- Emailing, texting, calling, flyers, RSVP form.
- Then do it all again! It takes a lot of outreach to secure attendance.
- **Incentivize attendance:** Can you offer financial incentives - gift cards? Raffle? Food is a must!



# Self-Filing & Sub-Site Events: *How-To*

## Make sure youth are prepared:

- Host a three-part event:
  - (1) “Taxes 101” workshop part 1 (PREP)
  - (2) “Taxes 101” workshop part 2 (PREP)
  - (3) Self-Filing or Sub-Site Event (FILE)

OR

- Meet one-on-one with each youth prior to the self-filing or sub-site event to review the [Tax Prep Checklist](#) and help them gather their documents.



# Self-Filing & Sub-Site Events: *How-To*



Logistics	Self-Filing Events	Sub-Site Events
<b>Timing</b>	<p>One event that everyone attends together. Recommended timing: 3 hours</p>	<p>Appointments are best, even if accepting drop-ins, to help estimate timing and attendance. Length of event entirely dependent on availability of VITA volunteers.</p>
<b>Space Requirements</b>	<p>1 large room with adequate space between youth to ensure privacy. Have designated check-in area for youth to check in and ensure they have their documents ready at beginning of event. Seating should allow visibility of projector screen and capability to work at computers.</p>	<p>1 room for appointments with adequate space between volunteers to ensure privacy. Separate waiting area/room ensures youth working on their taxes with a volunteer are not disturbed by those waiting for their appointment. At check-in, ensure youth have their documents ready while they await their appointment.</p>
<b>Equipment Needed</b>	<p>Projector with self-filing guide displayed. Computer for each student. Printer recommended.</p>	<p>Computer for each VITA volunteer. Printer recommended.</p>
<b>Staffing on Campus</b>	<p>At least 2 staff members recommended for groups of up to 15 youth. At least 3 staff for groups larger than 15.</p>	<p>At least 2 staff members recommended for groups of up to 15 youth (1 at check-in, 1 inside appointment room). At least 3 staff for groups larger 15.</p>
<b>VITA Volunteers</b>	<p>1 VITA volunteer for every 5 youth recommended.</p>	<p>Ask VITA site for their recommendation based on your group size and the time available.</p>