



History of the Coalition

Prior to 2006, the VITA Program in Omaha depended on a loose affiliation of agencies and sites to provide the volunteer service. While always the heart of the program, volunteers had few opportunities to formally study the complex system of tax law in order to execute their service. Taxpayers, too, faced few options to seek the help they needed to fulfill the obligation to file their taxes correctly and take advantage of every tax credit available to them to help their families move toward greater financial stability. The Coalition's involvement under the guidance of the United Way of the Midlands was limited to offering two one-day "super site" experiences per year from 2004-2006.

The super-sites involved between 40-60 volunteers to receive taxpayers and prepare taxes in a central computer lab at a school building. An additional 20 volunteers representing local bank, credit counseling agencies and other community services, offered taxpayers a variety of related financial services while waiting for tax preparation. The super site approach involved a lot of work to serve on average 50 taxpayers in a half-day experience. The Coalition reflected on the impact of these days, the quality of service in a compressed time and a one-time outreach and decided instead to pursue a more direct approach.

As a result, the Coalition began to coordinate the VITA program to bring some uniformity to the recruitment and training of volunteers, expand the capacity of sites to serve people with more than the "simple" tax return, and to expand the number of sites available to taxpayers during filing season and beyond. Moreover, we encountered that the opportunities present when compiling the financial statements necessary to file a tax return provided a remarkable gateway to also help families understand and work to improve their financial situations.

In 2007, the Coalition launched a volunteer recruitment and training program that brought together 82 volunteers working in 7 sites. Training consisted of an intensive week-long course, coupled with individual study groups and the use of the IRS' Link & Learn website-based study course. We stressed quality over quantity and served nearly 3,000 individuals, and it became clear that volunteers, who faced a wide variety of taxpayer needs, needed better preparation. The Coalition initiated at that time an effort to offer bank accounts and credit reporting and counseling to help families understand their finances. The Coalition also provided a mobile tax clinic to offer one day services at select businesses and agencies.

For the first time in the summer of 2007, we were able to offer a site with year-round services and a series of financial education forums to address the expressed interests of the taxpayers we served. The Coalition reflected on our volunteer efforts and re-vamped the recruitment and training program in 2008 to include more formal courses of study, linked with computer software instruction, to better prepare our volunteers to offer higher quality tax preparation. Courses for the first time were also offered in Spanish to serve the needs of this growing community in our area.



In Tax Year 2007, we opened an additional two sites and experienced a 104% increase in the tax returns we completed. Moreover, three sites continued to offer free tax preparation year-round. Our volunteers increased their ranks too, with 123 serving in 9 sites and we continued to offer the mobile site service.

While our training program had expanded and was flexible enough to accommodate the diverse needs and schedules of our volunteers, we knew we had to do better. The word was out on the streets of Omaha about the VITA program and as more taxpayers presented themselves for our service, we recognized that VITA volunteers had to be prepared for the ever-increasing complexity of the tax returns we prepare. In addition, we experienced the success of the asset development services we offered, but in order to deliver the high quality our customers expect, we needed to train more volunteers and engage more professional partners.

Another factor in serving our volunteers was the shortened time available to train volunteers. Courses usually began in mid-November when inclement weather, holidays and the need to ensure site readiness for the tax season were often competing with the stress of learning and certifying.

Based on the needs of our volunteers and to protect our quality of tax preparation, the Coalition instituted a new volunteer recruitment and training program for Tax Year 2008 that included a summer tax academy to build on volunteer experience and a recruitment and training program that prepared volunteers in the basics of tax law before the hectic fall schedule. Volunteers studied basic tax law September through November, self-certified with Link & Learn in November and December and then took a mini-course in tax law changes in January 2009 prior to the sites opening. This freed the Site Coordinators to prepare their sites with ample time and allowed tax instructors to assist students as they completed the process on their own.

While this new approach was successful, the Coalition was in the midst of transition between fiscal agents. We faced an especially difficult filing season, impacted by the downturn in the national economy, high unemployment and high anxiety experienced by both taxpayers and volunteers. Still, our volunteers excelled at their work and our Coalition also took a proactive stance in educating the taxpayers on the American Recovery and Reinvestment Act of 2009 through a major conference for stakeholders and televised town hall forums for taxpayers in June and July of 2009.

In July 2009, the Coalition became a program of Family Housing Advisory Services, Inc in Omaha as the United Way returned to its traditional role as a funding agency and member of the Coalition, rather than its administrator.

Throughout 2010 and 2011, the Coalition worked to establish its vision of effective VITA sites by inaugurating two Neighborhood Financial Stability Centers (NFSC) that have community computer labs for volunteer training and Coalition programming, expanded numbers of tax preparation stations, and space for educational seminars and exhibits from professional partners.



This chart illustrates the Coalition's growth in the last six years.

