



## **Volunteers' Frequently Asked Questions**

### **What is Community Action Duluth?**

Community Action is a nonprofit organization dedicated to eliminating poverty. One of our projects is to provide tax preparation assistance to individuals and families with limited resources. Dedicated and skilled volunteers provide the majority of our services. This project is a partnership with AccountAbility MN, a state-wide organization. Last year Community Action Duluth assisted 1264 households to claim over \$2.5 million in tax refunds!

### **Who will I be helping?**

Community Action Duluth provides free tax preparation services for families with incomes under \$50,000 and for individuals with incomes under \$40,000. The average income of our customers in 2008 was \$14,620. 23% of our customers were people of color. We serve many seniors and people who live in group homes. Our clients generally do not have access to affordable, professional tax preparation.

### **What will I do?**

Under the supervision of a site manager, you will prepare federal, state and property tax returns for the current year. Experienced tax preparation volunteers and the site manager are available to assist you and review your work. Some clients may have previous years' tax return and/or amended returns to complete.

If you work as an assistant you help clients complete forms, explain their tax forms as well as help them access other benefits via the Internet (Benefit Screener position).

### **What if I don't want to prepare taxes?**

There are many other opportunities to help. Site assistants greet our customers and sign them in as well as meet individually with each person to review their forms and complete an intake process. Site assistants also make copies of the tax returns and give clients their tax returns after completion.

### **What difference will I make?**

One hour of your time can help put \$2,000-\$3,000 in the pockets of a low income family. Each volunteer contributes to assisting low-income families and individuals by helping them to claim refundable tax credits such as the Earned Income Tax Credit (EITC) and the Working Family Credit. These credits can be received even if a person owes no tax. Taxpayers may also be able to utilize child tax credits and education credits. You can help boost a person's annual income as much as 50%.

### **Do I have to be a tax professional to help?**

NO. Experienced tax professionals train all volunteers in tax preparation. A basic background in tax preparation is helpful but not required. A new volunteer will complete 11– 14 hours of training prior to working at a site. The training is scheduled in January each year. Experienced volunteers complete tax update training each year to receive the most current changes on taxes. Training on electronic filing is also provided. The days, times and locations of these trainings are provided to volunteers who submit an application and attend an orientation. This information will be provided by email and/or mailing.

**What specific training will I receive?**

Community Action Duluth provides tax preparation training for all volunteers. First year volunteers must attend State Tax Training and Federal Tax Training. Experienced volunteers participate in a Tax Update training session. In addition, all volunteers participate in practice labs prior to volunteering at a tax site.

**Do we mail the returns in for clients?**

*For Paper Filing:* NO. We provide individuals/families with the original and a copy of the tax return and addressed envelopes. The clients are responsible for mailing in the return.

*For Electronic Filing:* YES. We complete the electronic filing at our office. We provide individuals/families with a copy of the tax return.

**Are we liable if we make a mistake with a client's return?**

NO. We participate with the IRS Volunteer Income Tax Assistance (VITA) program. We take the information that the individuals provide and complete the tax returns to the best of our abilities. All tax returns are reviewed by a tax reviewer to ensure the highest accuracy of the return prior to giving it to the client. We do not sign the tax return but indicate a VITA program number on the return.

**Do I need to bring anything to the site?**

YES. You should bring a calculator, pencil and your training resource materials with you to the site. You will be provided with training resource materials at your first training session. These are good resources to have available.

**What should I wear to the tax site?**

Casual dress is fine. Please be respectful of the clients, other volunteers and the community agency. Remember you are a representative of Community Action Duluth to the public, the clients, volunteers and the community agency.

**What if I have an organization that might be interested in getting more information or having a presentation made about volunteering?**

Contact Eric Blomstrom at Community Action Duluth at 726-1665 or by email at [eric@communityactionduluth.org](mailto:eric@communityactionduluth.org). We would be happy to make a presentation and/or have our display at an organization's event.

**How do I get further information about volunteering?**

Contact Eric Blomstrom at Community Action Duluth at 726-1665 or by email at [eric@communityactionduluth.org](mailto:eric@communityactionduluth.org). We would be happy to talk with you about volunteer opportunities.

**THANK YOU FOR SERVING THE COMMUNITY THROUGH  
COMMUNITY ACTION DULUTH.**

**19 North 21<sup>st</sup> Avenue West**

**Duluth, MN 55806**

**e-mail [eric@communityactionduluth.org](mailto:eric@communityactionduluth.org) phone 726-1665**

**Community Action Duluth Website**

**[www.communityactionduluth.org](http://www.communityactionduluth.org)**