

Western Income Tax Clinic



Program Review

2014

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Western USC Income Tax Clinic

The Income Tax Clinic (ITC) is a free tax preparation service offered to all Western students, and is operated under the University Students' Council's VP finance. The ITC runs for one week in March, as part of the Canada Revenue Agency's Community Volunteer Income Tax Program (CVITP). The objective of this program is to help eligible taxpayers who do not know how to prepare their tax returns, and who have low income and a simple tax situation. The Coordinator and the Executive Team are responsible for planning, marketing, and running the clinic, as well as organizing tax training sessions for volunteers in the weeks leading up to the event itself.



The Team

The executive team is composed of the coordinator, Logistics coordinator, Marketing coordinator, Volunteer coordinator and Affiliate coordinator, as well as over 100 volunteer tax filers. In some cases these positions are doubled to help with the demanding time that is needed to run the clinic during tax week.

The Gazette

“The clinic is intended to help students put together their income tax forms. Volunteers will have details on filing taxes, common deductions for students and new tax savings announced by the federal government earlier this month. »

« The average student tax refund amount was about \$380 »

Review Questions

1. The programs Mandate is to provide a quality level of tax solution services to the western community at large. As well as providing one of the USC's largest volunteer opportunities.
2. n/a
3. In the past years the program has successfully filled thousands of income Tax Returns for students and young families. As well as provided tax training to over 500 students in the last 3 years alone. Ensuring that we are successfully following our mandate.
4. In recent years the clinic has been increasing it's level of educational services about income tax. Last year providing Income tax "cheat books" with common deductions and questions as created by CPA.
5. The program could increase its educational action to better educate it's clients about the benefits of filing their tax returns
6. The programs mandate describes the program with a good level of accuracy
7. n/a
8. The program is focused on providing an effective tax clinic for those in need of the service
9. n/a
10. The program can improve upon its training capabilities. This must however be balanced with the volunteers time, training last year consisting of 2 sessions and a remedial session if deemed need for select volunteers.
11. The program could further enhance its educational offerings to those interested
12. The program is headed by a coordinator and a team of 5-10 executive who help to run an effective tax clinic
13. Yes, this has been deemed the most effective structure
14. The Program, run through the usc, uses the computers, room/space, and provides a necessary service to students who maybe filling taxes for the first time in their life.
15. The effective program directly help any students the university as well as provides real world experience to MOS accounting students who tend to take a primary roll in volunteering.
16. I would estimate about 600 students benefit directly from this program every year.
17. With about 150 students benefiting after receiving tax training and the remaining 450 are students who have had their tax return filed for free saving the students over \$11,000. (24.99 per return @ HR block)
18. Volunteers are able to increase their knowledge about income tax and place academic learning to the test by gaining this real world experience. Students using the clinic are able to see how taxes are filed, receive their income tax return and grants and also learn a few things about the tax system.
19. Applications for exec positions start in September and volunteer sign up starts in December and January.
20. No this program is open to any one and locations are always accessible
21. The programs relies on previous volunteers, word of mouth, advertising online (Facebook, and the USC website)
22. n/a
23. Yes as mentioned in question 20
24. Yes I believe the volunteers who run the program do have enough support as long as there continues to be a carry over of volunteers each year
25. The program provides its volunteers with the opportunity to make a tangible and visible difference for each and every client.
26. The average Tax filer would be volunteering about 30 hours over the course of the program including training, and clinic week

27. The new volunteers are paired with returning volunteers, this is to ensure we have a continuous pool of knowledge that gets passed along every year, and also provides the opportunity for first and second year students to network and socialize with upper year students in similar programs
28. There have been no large changes to the program
29. The user ship of the program has remained relatively unchanged, with most clients being 2 or 3 year students or first year new Canadians.
30. Most research was gathered from working hands on in the clinic for the last 2 years as well as previous reports
31. Due to the timing of the portfolio being selected for review and the choice to have reports submitted prior to the start of the 2014/2015 semester it very difficult to conduct a review without a large contributor base.
32. This report is due to be submitted by the 7th of September 2014
33. The timing of the review is poor and should be done a month or two prior to the end of the fall/winter semester. However due to the program's simple mandate, this review is still an accurate representation of the program.
34. This review process should look at the programs it is reviewing and decided when the most effective review time is for each program to increase it's effectiveness.

2014 Income Tax Clinic Final Report

ABOUT US

The Income Tax Clinic (ITC) is a free tax preparation service offered to all Western students, and is operated under the University Students' Council's VP finance. The ITC runs for one week in March, as part of the Canada Revenue Agency's Community Volunteer Income Tax Program (CVITP). The objective of this program is to help eligible taxpayers who do not know how to prepare their tax returns, and who have low income and a simple tax situation. The Coordinator and the Executive Team are responsible for planning, marketing, and running the clinic, as well as organizing tax training sessions for volunteers in the weeks leading up to the event itself.

GOALS

The main objective of ITC 2014 was mistake-free tax return filing. This objective was accomplished through making two major changes to the program.

First, the entire process was significantly changed from previous years. Before, filing and submitting returns (E-filing) were done in two separate steps, by different volunteers, at different times. As a result, problematic files were discovered while E-filing, and the returns could not be sent to the CRA. This created the problem of being unable to immediately inform students (especially when their contact information was unavailable), and the inability to identify the cause of the issue, as there was no record of the volunteer who filed the return in the first place.

This year, filing and submitting were consolidated into one step, carried out by the same volunteer. The person who filed the return for the student must also be the one to submit it to the CRA. Therefore, problematic files were discovered on the spot, with the student present, which made it a lot easier to identify the cause of the issue. Furthermore, each student left with the knowledge of whether their tax return was received by the CRA. If the submission was successful, the student received an E-file confirmation number for their own records. If the submission was unsuccessful, the student received information on subsequent actions to take, such as mailing in the return themselves.

Second, volunteer training was overhauled and was made into a much more comprehensive program. In previous years, each volunteer attended one lecture-style training session in early March. This year, new volunteers were required to attend two training sessions, while returning volunteers only needed to attend one. The first round of training (4 sessions) occurred the week before Reading Week. The second round (5 sessions) took place the first week of March. A final session was held the weekend before the Clinic week for those who were unable to attend previously and for those who wanted extra help.

Each session was attended by 20–30 volunteers and at least 3 members of the executive team. This ensured that everyone was able to have their questions answered, and to allow for more interaction between the executive and volunteers. Each training session was divided

into two parts: a 30 minute lecture, and time at the end to work on practice questions. The volunteers had the opportunity to work at their own pace and apply the knowledge they learned. The exec also had the chance to verify that the volunteers were prepared to file real tax returns.

TIMELINE AND RECOMMENDATIONS

October 2013

I contacted the CRA's London CVITP Coordinator to register Western's Tax Clinic as a community partner. The person holding this position changes every year, so it is important to establish communication as soon as possible, because this person is the most important point of contact for the ITC. From the CVITP Coordinator, I received forms, guides, important dates, and a variety of other CRA resources that were essential to operations. The CVITP Coordinator is the one to turn to with any questions about running the clinic (e.g. CRA policies).

I met with the Faculty Advisor to discuss strategies, recommendations and learning points from previous years. Applications for the Executive Team were released on October 10 to the USC website. Furthermore, students taking tax courses (MOS 3362 and 4462) were notified of the application process by email from DAN Management Tax Lecturers. Interviews were conducted with selected candidates October 28–30.

The original plan was to have 1 Logistics Coordinator, 1 Marketing Coordinator, 2 Volunteer Coordinators, and 1 Affiliate Coordinator. There was a lack of interest in Affiliate Coordinator, so the role was not filled. In terms of future suggestions, the Logistics Coordinator is not necessary. The role description was:

- Responsible for organizing the tax clinic on a functional basis and foreseeing potential problems that may arise
- Works with the ITC Commissioner to ensure a successful clinic, and will be responsible for booking rooms, equipment, and area for the tax clinic

The nature of the role is very limited, and most of the above responsibilities fell to the ITC Coordinator, which worked out as it was a more efficient method of operation.

In addition, the Marketing Coordinator should go to someone who has a solid background in marketing, Photoshop and design skills, and a detailed plan (or even some big ideas) for ways to raise awareness for the ITC. Marketing was an area of weakness this year. Although the Clinic saw overall steady traffic throughout the week, there were some periods of zero traffic, which could be improved upon with a more sophisticated marketing plan from the beginning. It is not necessary for the marketing coordinator to have any experience or background in tax.

Finally, the traditional Volunteer Coordinator role was split off into two different roles filled by four people. A new position, Training Coordinator, was created. The focus of this new role was to develop a sophisticated training program, which involved everything from creating presentation slides, preparing practice questions, and dealing with all details related to training. Therefore, it is important for the people holding these roles to have extensive past experience (e.g. worked for the CRA, volunteered with the ITC) or knowledge of taxes (e.g. enrolled in tax courses at school). A final quality to look for is the ability to speak in front of an audience, as the executive team will be relied on to help conduct training sessions.

Final decisions on the Executives were sent out November 8. The team was: 1 Logistics Coordinator, 1 Marketing Coordinator, 2 Volunteer Coordinators, and 2 Training Coordinators.

November – December 2013

The first group meeting was held on November 25, where we discussed the plan for the tax clinic, reviewed responsibilities, and shared ideas. A few people received tasks beforehand, and presented results at the meeting. It is important to use this first meeting as an opportunity to organize the general steps of what you are trying to accomplish throughout the rest of the year, and to make sure that everyone has a clear understanding of their responsibilities. We covered enough that we did not require another full group meeting later on.

One area of discussion during the first meeting was marketing; we discussed where to advertise and potential people to contact. However, we simply brainstormed ideas and did not go into details. A recommendation for future years is to use this as a starting point for a fully developed marketing plan, which consists of details such as who will do what, and when each step will take place. This year, we had a lot of ideas, but since we didn't have a concrete plan, the "taking action" part of the marketing strategy did not occur until much later in the year. As a result, the quality suffered, especially considering that the amount of work in other areas, such as training, significantly increased later in the year.

To submit tax returns as a community organization, all coordinators were required to register for an EFile account with the CRA. This was a very important step that could not be delayed. The registration process itself could take up to a month, and the accounts must be finalized in time for the clinic. EFile registration was a point of confusion, as the CRA provided conflicting information on what to do. How I proceeded, and what I recommend for the future, is as follows: only one account is needed (created under the ITC Coordinator's name and Social Insurance Number); however, the rest of the exec team should also register for their own EFile accounts as a precautionary measure (e.g. in case the main account does not work for whatever reason). During the clinic week, we used the one EFile account under my name with no issues.

On November 26, volunteer applications were released to the USC website. Once again, I reached out to the Faculty Advisor to email tax students encouraging them to apply. Executives of various clubs at Western were also contacted. However, it is uncertain how many of them actually alerted their members about the volunteer opportunity, so the effectiveness of this method of advertising could not be determined. The deadline for applications was December 5.

The executive team collaborated in selecting volunteers. From over 300 applications, we selected 130 volunteers, 15 of whom would end up dropping out. This was not an issue, as we had enough people covering each shift and there was never a shortage of volunteers. The volunteer breakdown was: 9% first year, 14% second year, 31% third year, and 46% fourth year students. The goal was to have a good balance of people with tax knowledge and prior experience, as well as younger students who could be returning volunteers in future years.

Final decisions were sent out on December 13, along with instructions on how to register as volunteers with the CRA and a mandatory form to fill out (T242 Form). The CRA provided online webinars for volunteer training on a number of topics. I encouraged all volunteers to attend these webinars, but did not make them mandatory. The formal training sessions we were planning would be sufficient in preparing volunteers on proper tax filing.

January – February 2014

The end of January is when work started to pick up, and given the nature of this event, it is difficult to redistribute more tasks to earlier in the year. Upon returning to school, we began collecting T242 forms. This was an important step because volunteers who don't submit a form cannot volunteer per CRA rules. Submitting T242s was also a mandatory requirement for EFile registration. A few people failed to submit forms, despite the numerous opportunities to do so, and were thus unable to volunteer.

Reservations for the laptops were made with USC Media and Communications. To file tax returns, we used the software UFile. Once I received software access keys from the CRA in mid-February, I arranged a meeting with the Manager in Media and Communications, in order to install UFile on all of the laptops. At the time, my EFile registration was confirmed, and I was able to enter the information into the software, so that all the laptops were completely ready to file and submit returns. It is recommended that the ITC Coordinator carry out all the actions outlined above, because leaving volunteers to do so during the Clinic could cause confusion.

In January, we decided on the exact dates and times for both rounds of training sessions (10 dates in total) and booked rooms on campus for them. One A/V key was also rented from Room Reservations in the Support Services Building. We did not need to book space for the clinic, as the west Mustang Lounge was already secured for us over the summer. This year, instead of T-shirts, we provided all volunteers with nametags, which were bought from Staples and printed at Creative Services. Nametags are not only a more economical option, but also help students and the exec team identify specific volunteers throughout the week.

We used a website called VolunteerSpot (www.volunteerspot.com/login/signin) to schedule volunteers for training sessions and clinic shifts. VolunteerSpot was an effective resource that I recommend for future use. The Volunteer and Training Coordinators conducted all training sessions, and prepared the training and presentation materials beforehand. The training sessions ran smoothly and there were no major issues. A few volunteers did not attend training, despite the varied days and times to choose from, and were thus released from the program.

The ITC was marketed through the USC website, posters around campus, newsletters, Facebook event, as well as reaching out to club execs to help spread the word among members. In the future, I recommend dedicating more advertising efforts to the Affiliate colleges and attract more students to use the clinic. Although it would be nice to have volunteers on site at the Affiliates, a long history of poor attendance has demonstrated that this is a difficult task. Therefore, it may be prudent to continue focusing on successfully operating in the one location in the UCC.

March 2014

The Mustang Lounge was a significant upgrade over the Atrium, which was the space used in previous years. The Lounge was quiet and private, with less crowding and distractions, which is a beneficial environment when discussing sensitive information. However, a major issue with the west Mustang Lounge was poor accessibility and visibility. A number of people informed us that it was very difficult to locate us, as not everyone knows about the hallway that leads to the West Lounge. Despite our requests, the wall between the two sides of the Lounge was left up during the majority of the clinic. Furthermore, there were a number of events occurring in the East Lounge. At times, the event organizers closed and locked the doors between the two sides, effectively cutting us off from the rest of the building. In the future, I recommend using the East Lounge, because accessibility and visibility are essential to maintaining traffic. If this is not possible, I would still recommend the West Lounge over the Atrium.

The second major issue we encountered during the Clinic week was the use of the blackboards. Having signs in the Atrium directing people to the Mustang Lounge is very important. For next year, I recommend finding a way to formally book the use of the blackboards. I also recommend printing more posters, particularly larger, highly visible ones that provide directions to the clinic.

We did not encounter any other major issues during the Clinic. The executive team was always present at the front table, screening students before sending them in to see the volunteers. We always made sure that the students met eligibility requirements, and brought all required documents. These checks ensured efficient operations and identified any unique situations beforehand to avoid complications for the volunteers.

The 2013/14 Budget

LTPC MISCELLANEOUS								
Total LTP Committee				0.00				
ITC HONORARIA	-	-	-	-	500.00	500.00	500.00	education
ITC ADVERTISING	116.66	-	1,275.11	500.00	500.00	500.00	500.00	education
ITC COMPUTER RENTALS				1,000.00	1,000.00	1,000.00	1,000.00	education
ITC POSTAGE/COURIER	-	10.80		100.00	100.00	100.00	100.00	education
ITC COPYING/PRINTING	492.37	573.70		150.00	150.00	150.00	150.00	education
ITC OFFICE SUPPLIES		-		75.00	75.00	75.00	75.00	education
ITC MISCELLANEOUS	604.99	1,097.11	848.55	300.00	300.00	100.00	100.00	education
True cost								
Total Income Tax Commissioner	1,214.22	1,681.61	2,123.70	2,125.00	2,625.00	2,425.00	9,202.00	education
ICFC HONORARIUM								

The 2014/15 Budget

Income Tax Clinic \$2500 (VP Finance)

The ITC provides a meaningful volunteer experience for students looking to increase their skills in finances, as well as a community service to students wishing to get their taxes filed. The program has cost about \$1500 for the past 4 years. The line has been changed to reflect the actual cost. It is the second largest volunteer program we run (with over 200 volunteers) so we are recommending increasing the honorarium to \$1000. This is a big job and deserves a bigger honorarium. We have made changes to the program to provide better training of volunteers, hopefully resulting in a better service to students.

Applications and Role Descriptions



INCOME TAX CLINIC 2014, University Students' Council

About Us

Income Tax Clinic (ITC) is a free service offered to all undergraduate students at Western and is operated under the University Students' Council's VP finance. This service is offered for one week at the end of March, and our clinic is a community partner with the Canada Revenue Agency. The income tax clinic coordinator and the ITC executive team is in charge of planning, organizing, and managing this USC's annual income tax clinic at the University.

Executive Roles and Responsibilities

Knowledge in Tax is an asset, but an interest in learning tax is mandatory.

Logistics Coordinator

- Responsible for organizing the tax clinic on a functional basis and foreseeing potential problems that may arise
- Works with the ITC Commissioner to ensure a successful clinic, and will be responsible for booking rooms, equipment, and area for the tax clinic

Marketing Coordinator

- Responsible for creating various marketing tactics for the tax clinic to extend the UWO population reach
- Goal is to reach a larger portion of the community, so creative and well-planned marketing initiatives will be needed

Volunteer Coordinator

- Responsible for recruiting and scheduling volunteers and day managers for the tax clinic and ensuring that they are well prepared for the clinic
- Works with the ITC Commissioner to hold volunteer info sessions

Affiliate Coordinator

- Must be a student registered at an affiliate campus
- Act as a liaison between affiliates and the USC Income Tax Clinic
- Work with logistics coordinator and marketing coordinator to figure out operations and market directly to the affiliate campuses
- Work with volunteer coordinator in reviewing the volunteer applications of students from affiliate campus

