

Welcome!

Thank you for joining the webinar on **Insights on hosting volunteer income tax clinics**, hosted by Prosper Canada.

The presentation will begin shortly.

Technology Details:

- For technical assistance, please call GoToWebinar support line 1-855-352-9002.
- Participants should connect using VOIP. Please check that the volume is turned up on your computer.
- If dial in option is required, please dial in as follows:
 - Tel (Canada): +1 (647) 497-9416
 - Access Code: 177-884-331
 - Toll free option not available

Webinar logistics

- Audience members have all been **put on “mute”** for this webinar
- Please **share any questions you have using the “Question box”** (located at the bottom right side of your screen).
- We will share webinar slides with all participants and post a recording of the session within a few days.
- Do you Tweet? We’ll use hashtags **#taxfiling** and **#CVITP** on Twitter during the webinar **@prospercan**

Prosper Canada – Who we are

Founded in 1986, Prosper Canada is a national charity dedicated to expanding economic opportunity for Canadians living in poverty through program and policy innovation.

As **Canada's leading champion of financial empowerment**, we work with governments, businesses and groups to develop and promote financial policies, programs and resources that transform lives and foster the prosperity of all Canadians.

We help service systems and organizations in all sectors to build proven financial empowerment approaches into their businesses in ways that:

- Are **sustainable**
- Help them **achieve their goals**
- Tangibly **increase the financial well-being of the low-income people** they serve.



Agenda

- In brief – the **importance of tax filing**
- The **CVITP**: How it works
 - Nancy McKenna, *Canada Revenue Agency*
- **Insights from the field**
 - Irene Chan and Lay Lee Loh, *Agincourt Community Services Association (ACSA)*, Scarborough, ON
 - Luc Stone, *E4C*, Edmonton, AB
 - Althea Arsenault, *Economic and Social Inclusion Corporation (ESIC)*, Fredericton, NB
- **Q&A**

The importance of tax filing

- Tax time opportunity to **boost incomes**
 - Canadians living on low incomes can access a wide range of government benefits at tax time
- Many **federal and provincial income** benefit programs
 - Income supports such as Canada Child Benefit, Working Income Tax Benefit, GST/HST credit
 - Some benefits only accessible via tax filing

Accessing Income-Boosting Benefits through Tax Filing

<http://prospercanada.org/Resources/Publications.aspx>



CVITP

Community Volunteer Income Tax Program

Nancy McKenna

Community Organizations

1. Register online

- Organization registration
 - <http://www.cra-arc.gc.ca/tx/ndvdl/vlntr/prtnr-eng.html>
- Province of Quebec
 - <http://www.revenuquebec.ca/en/sepf/formulaires/com/com-301.aspx>

2. Recruit and train volunteers

- Ensure all volunteers
 - fill out the online registration and register for EFILE or provide a police records check.

3. Set-up, promote, and host tax clinics

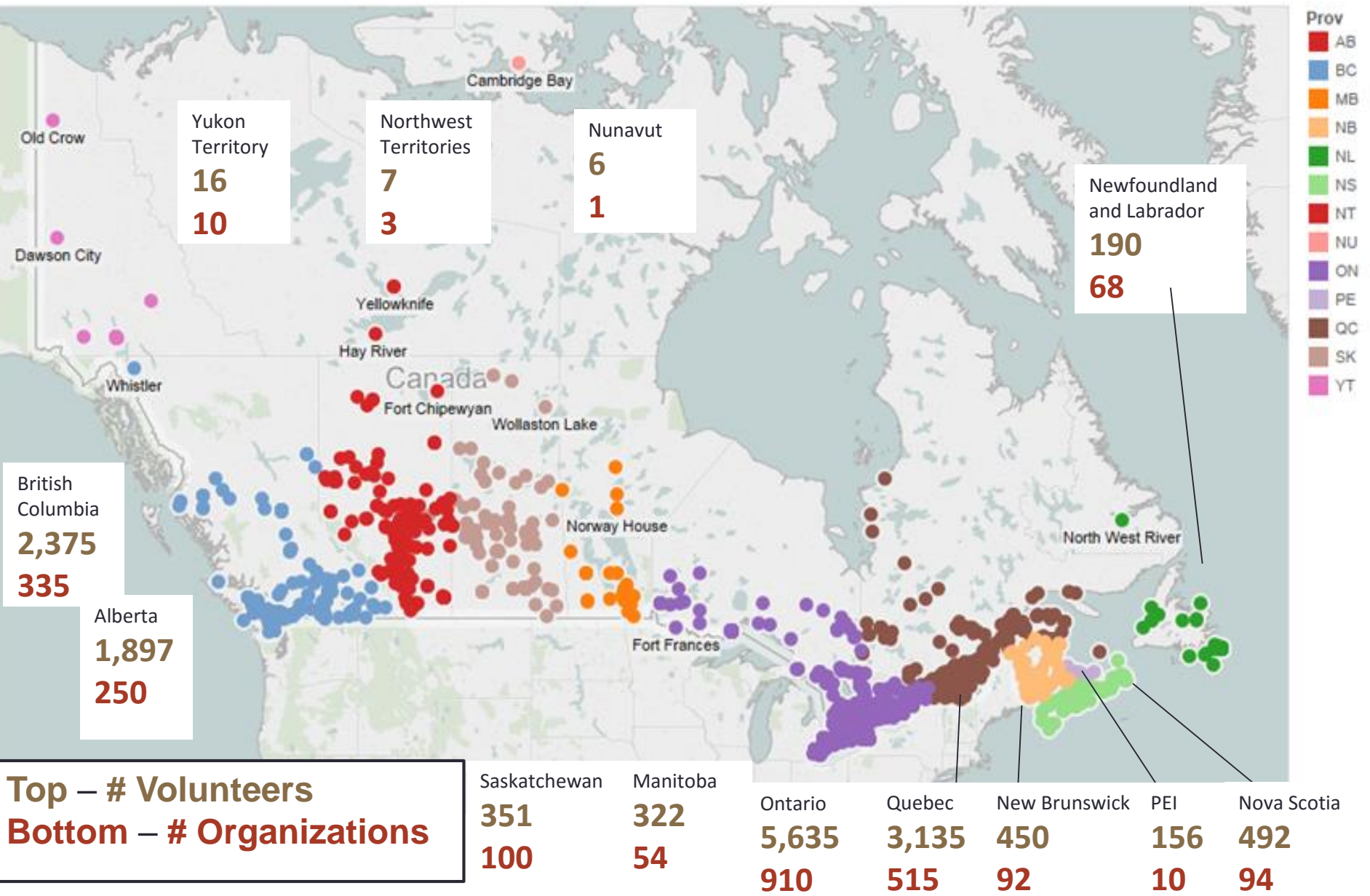
Canada Revenue Agency CVITP

- Provides guidance and support to community organizations, their coordinators and volunteers
- Promotes income tax clinics on the [CRA website](http://www.cra-arc.gc.ca/tx/ndvdl/vlntr/clncs/menu-eng.html)
 - <http://www.cra-arc.gc.ca/tx/ndvdl/vlntr/clncs/menu-eng.html>
- Provides training and free income tax preparation software
- Donates computers to eligible community organizations

Example of online tax clinic listing

Organization:	<div></div> Toronto
Contact person:	<div></div>
Phone number:	416- <div></div>
Location:	<div></div> Toronto, <div></div>
Email:	<div></div>
Clinic dates:	Year-round Every Monday to Friday 9:00am to 4:00pm
Clinic type:	With appointment
Client type:	For newcomers only
Language:	Cantonese, English, Vietnamese
Notes:	Prior and current year returns

2016 Results: 692,500 individuals assisted, 750,000 returns



Reaching out to Canadians

Ministers mandate

Outreach

Auto-fill and Auto-complete

CVITP: Contact

Fill out an **online form** (for community organizations only)

<http://www.cra-arc.gc.ca/tx/ndvdl/vlntr/nfrmtn-eng.html>

Call

Pacific 1-888-805-6662

Prairies 1-866-315-8833

Ontario 1-877-493-4064

Quebec 1-544-233-9951

Atlantic 1-855-516-4405

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ACSA

Agincourt Community Services
Association, Scarborough, ON

<http://www.agincourtcommunityservices.com/>

Irene Chan and

Lay Lee Loh



ACSA – Agincourt Community Services Association

- Who we are
 - A non-profit, **multi-service agency** founded in 1970s
 - Programs and services for families, children, youth, seniors, homeless and newcomers
 - **Financial Empowerment and Problem Solving (FEPS)** program aims to increase community financial awareness
 - **Tax clinic** is one part of the FEPS program



Tax Clinics at ACSA

- March-April tax clinics operate Monday to Saturday
 - **March:** current year taxes only, **April:** past year taxes also
 - **Time** - 1 hr/ return in 1st week, 30 min/return after that
 - **Staff** - 2 full time, 2 temp, 1 receptionist, 40 volunteers
 - **Locations** - 3 different sites (main site and 2 branch sites);
Off-site tax clinics at senior homes
 - **Face-to-face** interactive service with clients; Good to educate clients and explore their issues
- **Year-round** tax clinics after April
 - **By-appointment** with ACSA staff members



Tax Clinics at ACSA

- **Volunteer trainings**
 - 3 hours training on basic taxation theory
 - Hands-on practice with taxation software (UFile) using case studies as examples
 - Training manual handout provided by staff



Insights: Running a successful tax clinic

- Start **planning early**
- Effective **volunteer training**
 - Weekly updates and reminders
- Smooth and **efficient intake process**
 - Efficiently feed information to volunteers and avoid backlog or piling of people in queue
- **Staff supervision**
 - Volunteers need someone to rely on and refer to

Achievements

- In **2016**
 - **2,109 clients** served
 - **2,243 returns** that translated to **\$7,862,264.24** in terms of refunds, tax benefits and credits to clients
- Educated and **empowered clients**
 - Help with knowledge to enable them to better take charge of their financial situation (examples: DTC, RDSP, SHOPTG)
- High participant **satisfaction**
 - 87% of participants were extremely satisfied with services
 - 97.9% percent plan to return next year



Challenges

- **Language barriers**
 - Planning for recruiting volunteers who speak 2nd language
- **Shortage of volunteers**
 - Forward planning: start recruitment early and contingency plan (e.g: reduce weekday appointments, increase in weekend), requesting other volunteers to increase hours in advance
- **Technological difficulties**
 - Telephones, wi-fi, printer and computer issues, EFile issues: Having technology literate staff, personnel at hand

ACSA - Contact

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E4C

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<http://e4calberta.org/>

Luc Stone



 **E4C**
MAKE
TAX TIME
PAY

E4C Edmonton

- Who we are
 - Edmonton non-profit organization for over 45 years to **alleviate, limit, and eventually eliminate poverty**
 - **Partnerships** with community, organizations, governments
 - E4C works with low-income Edmontonians from all backgrounds
- Program efforts
 - **Community building**, shelter and housing, food security, education, skill development, financial empowerment
 - **Make Tax Time Pay (MTTP)** located in all quarters of Edmonton and in Sherwood Park, for low-income persons
 - MTTP started to increase the take up of government benefits, specifically **Alberta Child Health Benefit**



Make Tax Time Pay

- Make Tax Time Pay tax clinics
 - **21 partner sites** throughout the city (churches, libraries, social services agencies, and others)
 - March-April, range 3x/week to 2x/month, **variety of times**
 - **E4C provides coordination**, training, and supplies
 - **Each partner site recruits and schedules volunteers**, provides space, upholds high standards of service
 - 2-1-1 “The Support Network” central referral for booking
- 1 full time staff and 1 seasonal assistant

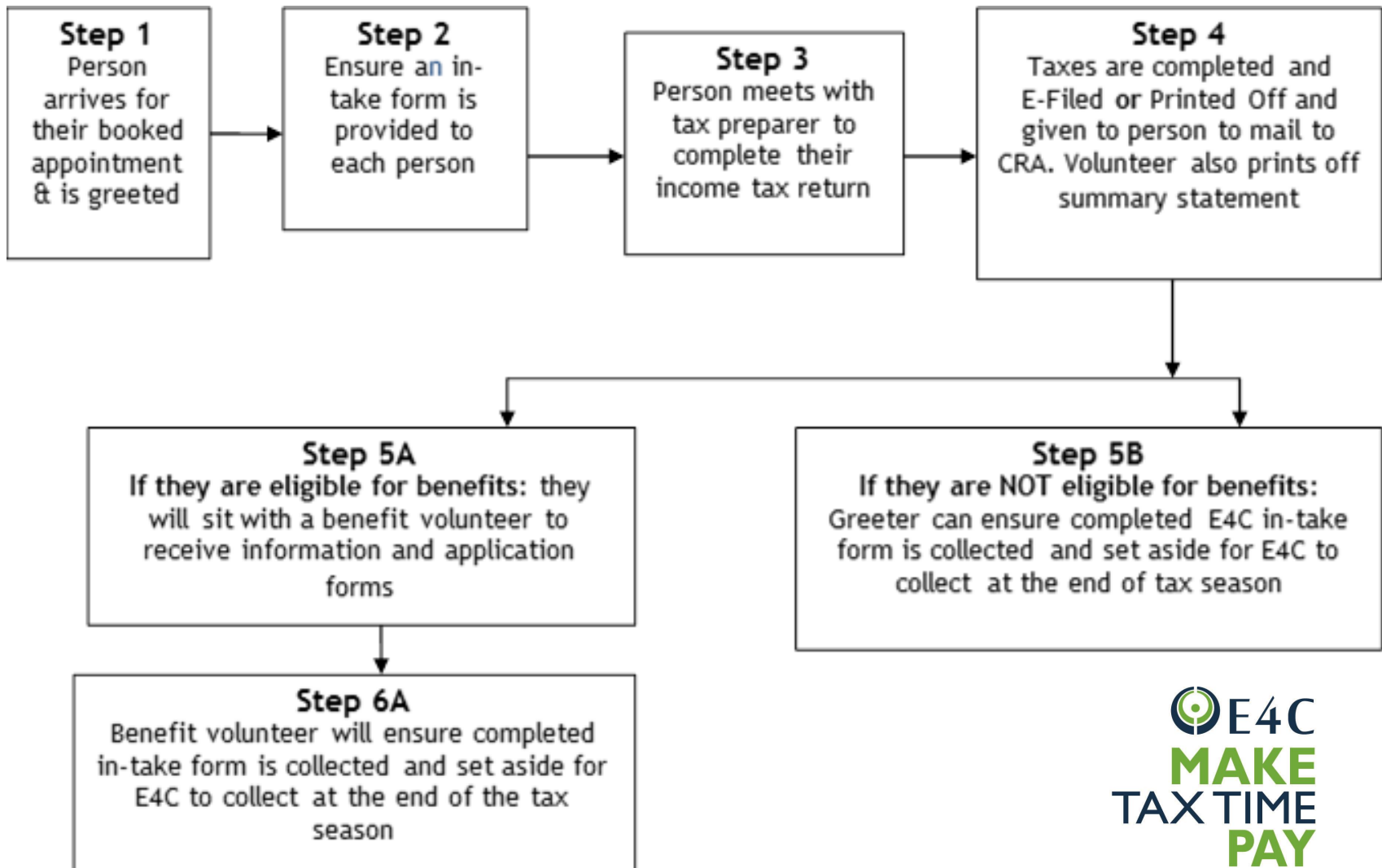


Make Tax Time Pay 2016

- **Site coordinators**
 - Each site oversees operation and connects with E4C
 - Over 400 hours dedicated annually; Could not manage without them!
- **2016 season**
 - **4300 tax returns for 3700 individuals**
 - \$1.59 Million in tax refunds, \$1.32 Million in GST, and \$3.86 Million in Child Tax Benefits
 - ...for a **total of \$6.77 Million!**



Make Tax Time Pay: On-site process



Insights from Make Tax Time Pay

- 10 years of operations and **building relationships**
 - Client & tax preparer side-by-side **demystifies the process**
 - Common for clients to ask for same volunteer as last time
 - A variety of positive volunteer experiences
- Ongoing **challenges**
 - 10-20% '**no-show**' appointments; use strategies like reminder phone calls, some 'over booking'
- Some personal highlights
 - Working with apprehensive clients
 - **Anxiety turning to relief**



E4C - Contact

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***Althea Arsenault,
Economic & Social Inclusion Corporation
Fredericton, NB***

“Get Your Piece of the Money Pie”



Economic and Social Inclusion Corporation

- ESIC is responsible for the coordination & implementation of the *Overcoming Poverty Together* plans (OPT2 & OPT2).
- Unique approach rallying the government, businesses, non-profit community organizations and people who experienced or are living in poverty.
- ESIC collaborates on numerous projects that are related to poverty in NB with a major one being *“Get Your Piece of the Money Pie”* – The NB Income Tax project.

The 2017 Money Pie Team

- Economic and Social Inclusion Corporation & the 12 Community Inclusion Networks (CINs)
- Canada Revenue Agency
- NB Departments of Social Development & Health
- NB Public Library Service
- Service Canada
- First Nations



Get Your Piece of the Money Pie

- Started with 3 people (SD, ESIC, CRA)
- Work off the corners of our desks
- No Ministerial direction, mandate, MOUs, per diems
- We developed the partnerships to advance the tax clinics as it was the right thing to do to help people
- Low-income focus group told us they didn't connect with CVITP, came up with *"Get Your Piece of the Money Pie"*



The 2017 Money Pie

- 6 years later we are a team of 8-10 people
- Presented to Ministerial Committee to formalize the Money Pie project
- Looking to hire 1 FT person for 2 years
- Promoting the “bundle”









GET YOUR PIECE OF THE MONEY PIE

Depending on your personal situation, you **may** be eligible to receive credits and benefits by simply filing your 2014 income tax return.



Did you know ...

-  A single person could receive up to **\$1,413**. *
-  A single parent with one child under the age of 6 could receive up to **\$8,670**. *
-  Two parents with two children under the age of 6 could receive up to **\$14,470**. *
-  Persons with a disability could be eligible for a tax credit of **\$1,876**.
-  Parents with school aged children could receive a \$100 per child **School Supplement** benefit.
-  Your child could qualify for New Brunswick's dental and vision program for children of low-income families.

**Based on the assumption that there is some working income.*

If you need help preparing your income tax and benefit return, the Community Volunteer Income Tax Program (CVITP) may be able to assist you. This **free** program is available to eligible taxpayers who have modest income and simple tax situations.

For more information on this service, visit www.cra.gc.ca/volunteer or call **1-800-959-8281**.



Ensemble pour vaincre la pauvreté
Overcoming Poverty Together







New Brunswick

PRENEZ VOTRE PART DU GÂTEAU

Selon votre situation personnelle, vous **pourriez** être admissibles à certains crédits et prestations en remplissant simplement votre déclaration de revenus pour l'année fiscale 2014.



Saviez-vous que ...

-  Une personne seule peut recevoir jusqu'à **1 413 \$**. *
-  Un parent célibataire avec un enfant de moins de six ans peut recevoir jusqu'à **8 670 \$**. *
-  Deux parents avec deux enfants de moins de six ans peuvent recevoir jusqu'à **14 470 \$**. *
-  Les personnes ayant un handicap pourraient être admissibles à un crédit d'impôt de **1 876 \$**.
-  Des parents avec des enfants d'âge scolaire peuvent recevoir un **supplément scolaire** de 100 \$ par enfant.
-  Votre enfant pourrait être admissible pour le programme de soins dentaires et de la vue du Nouveau-Brunswick pour les enfants de familles à faible revenu.

**En supposant que la personne gagne un revenu de travail.*

Si vous avez besoin d'aide pour remplir votre déclaration de revenus et de prestations, le personnel du Programme communautaire des bénévoles en matière d'impôt (PCBMI) peut possiblement vous venir en aide. Ce programme est offert **gratuitement** aux contribuables admissibles, qui ont un revenu modeste et une situation fiscale simple. Pour obtenir d'autres renseignements sur ce service, consultez le site www.cra.gc.ca/benevole ou composez le **1-800-959-7383**.



Ensemble pour vaincre la pauvreté
Overcoming Poverty Together

New Brunswick

NB Results 2010 to 2015

N.B.	2010 filing season	2011 filing season	2012 filing season	2013 filing season	2014 Filing season	2015 Filing Season
Volunteers	363	352	443	579	539	450
Returns filed	13,969	14,481	17,705	17,763	20,124	21,402 (2,995 filed @ yr round clinics)
# of clinics	118 (3 yr round)	110	229	252	224	218 (583 clinic days) (63 Yr round)



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Questions & Answers



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Online form(for community organizations)

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Thank you for joining us!

- **We will be sending you an email soon with:**
 - Slides from today's webinar
 - Links to webinar recording and post webinar survey
- **We will post the recorded webinar at www.prospercanada.org under 'Resources'**
- **Join us on November 30th, 1:00pm (EST)**
 - Tax filing supports – Alternatives to tax clinics*
 - <http://prospercanada.org/Webinar/TaxFiling-alternatives>
 - The Bissell Centre, Edmonton, AB*
 - Jane Finch Community and Family Centre, Toronto, ON*
 - The Working Centre, Kitchener-Waterloo, ON*

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