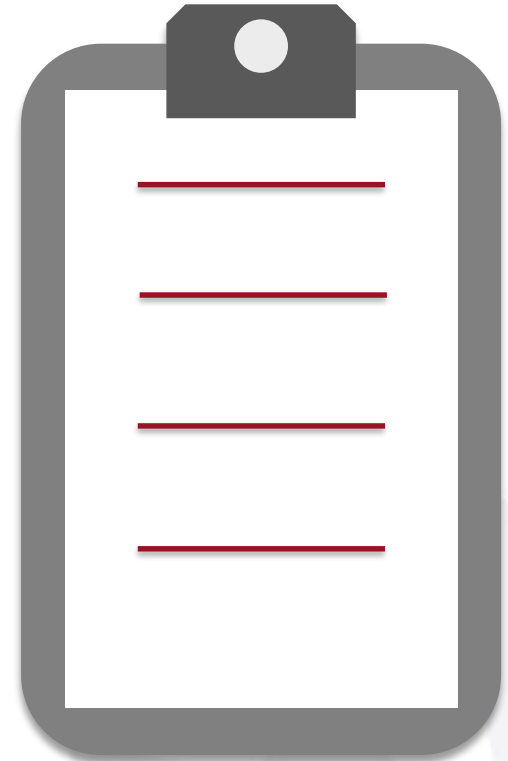# Supporting Organizations in the CVITP

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Agenda

- ❑ What is the CVITP?
- ❑ Research goals
- ❑ Methodology
- ❑ Data analysis
- ❑ Opportunities
- ❑ What's next

Community Volunteer Income Tax Program

Over **3,100** Community Organizations

Over **17,700** Volunteers

Over **703,400** People Helped

Over **786,600** Returns Filed*

Over **$1.7B** Refunds & Benefits**

Canada.ca/taxes-help

Canada.ca/taxes-volunteer

* This data is as of June 9, 2018 and subject to change

** The data is as of August 30, 2018 and subject to change. It applies exclusively to the 2017 tax return year and to benefits administered through the CRA during the 2018-2019 benefit year.

Research Goals

- Discover barriers that volunteers and organizations face participating with the CVITP

- Understand how the Program functions from the organizations' point of view

- Decrease the barriers for organizations and volunteers to improve the experience for clients

We asked participants about core components of the Program, why they are involved, what the CVITP can do to improve, and demographic details.

METHODOLOGY

Research Design

- We selected 46 organizations and volunteers to interview
- Participants were selected primarily based on geography
- We also conducted three pilot tests to identify any potential gaps or changes required

Participants by Region

- 7 in Pacific
- 11 in Prairies
- 8 in Ontario
- 7 in Québec
- 13 in Atlantic

Interview Process

- Participants were **asked 35 questions** total
  - 29 open-ended questions
  - 6 demographic questions
- Interviews lasted 45 minutes on average
- Interviews were conducted in both official languages

DATA ANALYSIS

Data Analysis

- Since we asked 46 people approx. 35 questions each, **over 1,500 responses** were generated

Coding

- We each read through all 46 interviews (1,500+ responses)
- We coded each answer with themes that captured these responses
  - This process is called thematic analysis
- After two rounds of coding, we met to develop a common 'theme list'

Code each response → Meet to discuss the process → Develop a common theme list
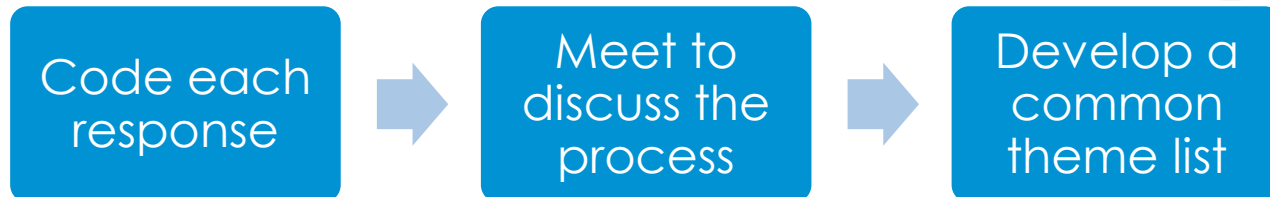
Example

"The training . Maybe going back to one on one, or a combination of those who like doing it online and people who like doing it in person. That'd be one thing ."

MV: He likes the personal, 1-1 approach.

Training (in-person)

Coding (continued)

- We compared the codes each of us gave in 3rd round to our 2nd round of codes
- Where our codes differed, we provided a rationale about what we felt the best code was
- Each of us used this finalized 3rd code to take to our consensus-building marathon meeting

First code → Second code → Final code

Consensus

- We went over each of the 1,500+ responses together and compared each of our codes

- When our codes differed, we debated the ideal code
  - we looked at the responses again and followed the precedents we set

- This process took about **16 hours** in total over two days ☺

Insights

Ways to look at data:

- Add up the frequency of themes for each question

- See what emerged in the responses to multiple questions (cross-tabs)

- Who said it? Look at responses by role, age, location, occupation, etc.

For example, perhaps 28 people mentioned 'dedicated help line' as a form of support they had, while only 4 people mentioned 'CVITP coordinator'.

Card Sorting Exercise
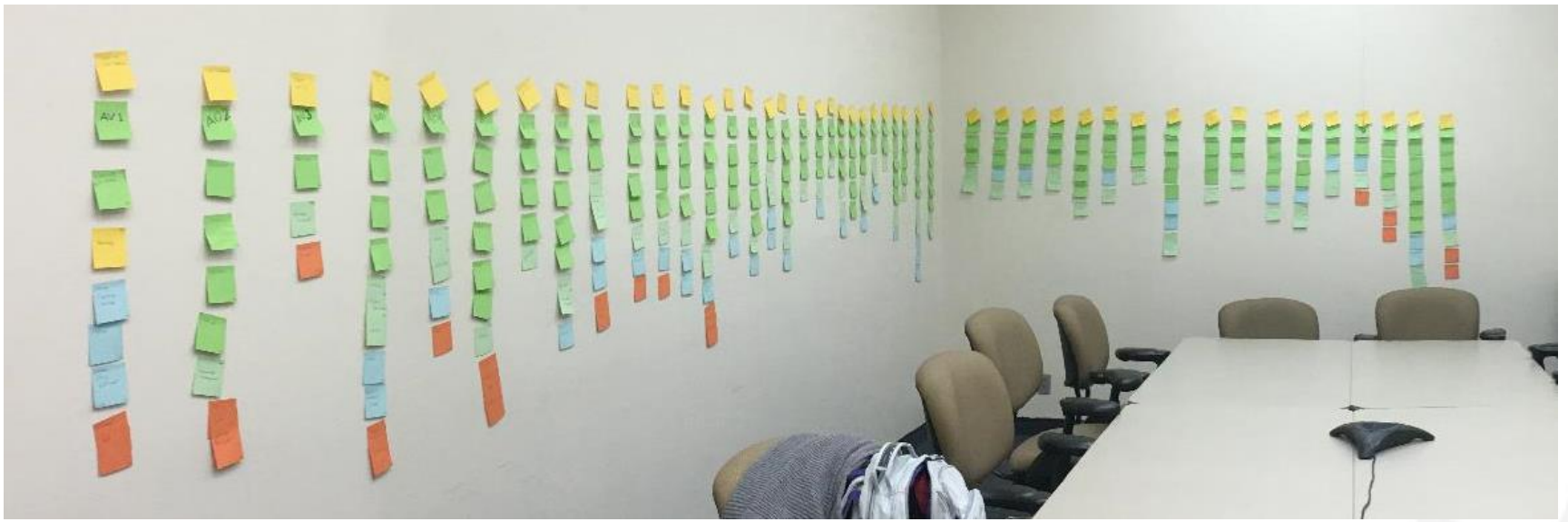
OPPORTUNITIES

Theme 1: Structural Changes

- Increase and Solidify Regional Staffing
- Increase Support for Organizations to Operate CVITP Clinics
- Formalize Volunteer Roles
- Expand Eligibility Criteria

"As a non-profit, finances are difficult. You rent a place, and lot time it's financial. The time you do the marketing. You don't do it during work time, you do it outside of work, which is difficult. On your own computer. Those kinds of things. You spend lots of money to do this program."
– Org Coordinator, Pacific Region

Theme 2: Component Changes

- Undertake a Systematic Review of CVITP Training

- Create Working Groups for CVITP Components

- Review the Program Procedures

"My first year, I found it [the training] slow, but necessary. Each year, they invite us to a training session to refresh our memory and go over updates, but I find there aren't many updates. It's a lot of repetition and generalities. I think that it could be more focused on specific situations, scenarios."– Tax-preparer, Quebec Region

Theme 3: Additions and Expansion

- Increase Year-round Support
- Create a Single-tiered Registration for the CVITP and EFILE
- Introduce More Targeted Services for Vulnerable Populations

"Improve the registration, you know, prevent these delays from happening. Students have to start filing returns ASAP, there really shouldn't be delays. Otherwise I'll have clients who will be on hold. It's not fair to the client or the volunteer." – Tax-preparer, Pacific Region

Theme 4: Third-party Collaboration

- Collaborate with Internal CRA Departments
- Work with the Software Provider and Internal CRA Stakeholders to Offer Direct Technical Support
- Explore more partnerships

"One thing we really need, that we use a lot, is the CVITP helpline. It's awesome, people doing work there are good; we have people coming in with no slips and we'll phone the helpline, they'll call this person and they give us the numbers, slips, and we can file their taxes pretty quickly. We can't send people away with a form to mail out because they have no address: a lot of our clients are in crisis, the last thing on their mind is taxes, they worry about where they sleep, what they're gonna eat, where their kids are, you know?"
– Lead Volunteer, Prairies Region

Theme 5: Giving Back

- Show More Appreciation to Organizations and Volunteers
- Show Positive Impacts of the CVITP

"You feel some pride that it's helped people in more ways than just getting their refunds and tax credits—it's impacted their lives as well." – Org Coordinator, Prairies Region

Theme 6: Procedural Changes

- Release Software License Keys Earlier
- Increase the Quantity and Efficiency of Resource Distribution

"We wanted to host clinics in multiple locations. We tried to, but had a lack of resources: we don't have computers and printers to travel to other places. Limited resources."
– Org Coordinator/ Tax-preparer, Ontario Region

WHAT'S NEXT?

Complementary Research

- End-of-season survey
- Case studies
- Working Group
- Roundtables

Wrap-up

- We concluded our study with a 190 page report

- A dashboard has been created to track progress on all of these opportunities as well as strategic directions from other reports

- We used a rigorous methodology to ensure clear, valid results