
Key role: Site supervisor

This role is crucial to undertaking a tax clinic. The site supervisor (or co-supervisor) is (are), essentially, the person(s) “in charge.”

They initiate key decisions, coordinate scheduling and volunteer support, and overall ensure the clinic runs as smoothly as possible. The site supervisor:

- Initiates contact with CVITP office to register clinic and engage any necessary support
- Support volunteers by ensuring they receive training and any other assistance needed on site
- Coordinates scheduling of clinic hours, volunteers, appointments
- Ensures space for clinic is booked, technical and material requirements are met (computers, pens/paper, printer, etc.)
- Is in charge in case of emergencies on site (fire drill, etc.)
- Ensures volunteer recognition at end of tax clinic operation.

Volunteers needed to operate a tax clinic

Tax clinic volunteers can perform various duties as needed. Ideal CVITP volunteers have some experience in preparing tax returns.

Generally, a volunteer can help to prepare taxes, act as a greeter, act as a resource volunteer, perform registration and intake duties, assist individuals with applications for certain government benefits and services, handle tax clinic statistics, and provide on-site technical support as needed, just to name a few.

It is important to note that all volunteers must be registered for the CVITP, regardless of their role in each clinic. **All volunteers must either complete their volunteer registration online** at or complete and sign Form T242, *Volunteer Information and Software Agreement*, which must be returned to your CRA CVITP Coordinator.

Volunteers should consult with their local coordinator to see where they would best fit. Below are some examples of the types of duties CVITP volunteers can undertake. However, a tax clinic **can also be run with just one volunteer who has been trained** and is willing to provide their time to assist their community.

Key volunteer roles are:

- Tax preparer
- Greeter
- Resource volunteer or mentor

Additional roles that may be helpful, depending on your clinic's size and staff capacity are:

- Intake volunteer
- Benefits volunteer
- Evaluation volunteer
- IT support volunteer

Always ensure volunteers are aware of the time commitment expected as part of their participation, which includes:

- CVITP training
- Tax clinic volunteer hours
- Any additional on-site training specific to your clinic
- Any volunteer recognition event post-tax clinic.

Tax preparer	Prepares tax returns with individuals
Greeter	Welcomes individuals to the clinic and answers questions
Resource volunteer/mentor	Experienced and knowledgeable volunteer that supports other volunteers
Intake volunteer	Assists tax filers to fill in intake form and answers questions
Benefits volunteer	Assists tax filers to apply for any government benefits or other services for which they are eligible
Evaluation volunteer	Collects any program evaluation data including participant satisfaction surveys, tax clinic results, etc.
IT volunteer	Supports on-site technical needs such as printers, wi-fi connectivity, computer support

Key volunteer roles

Tax preparer volunteer

These volunteers are the ones who prepare the tax returns with the individuals who come to the clinic. The ideal tax preparer volunteer is someone who:

- Has a basic understanding of income tax
- Is sensitive to the needs and realities of the individuals to be served
- Is comfortable working with computers
- Is compliant with CVITP guidelines
- Is able to attend the CRA training sessions on CVITP
- Is able to keep statistical data on the number of returns prepared

Greeter volunteer

The greeter is someone who welcomes individuals into the tax clinic and helps direct them on where to go and what to do. The ideal greeter is someone who:

- Has good communications skills
- Is friendly and welcoming
- Is able to answer general questions about CVITP and the community organization hosting the clinic
- Is able to attend training provided by the CRA
- Is compliant with CVITP guidelines

Resource volunteer/mentor

The resource person is typically an experienced volunteer who has volunteered at a CVITP before. They act as a support for other volunteers who may be new to the process. The ideal resource volunteer is someone who:

- Has previous CVITP volunteer experience
- Has strong leadership skills
- Is knowledgeable about preparing tax returns
- Is able to assist with scheduling or recruiting new volunteer

Other volunteer roles

These roles may not be available in all sites and will depend on the clinic's size and staff capacity. If the clinic has capacity to include any of the roles below, they can be especially valuable for clinics serving a larger number of individuals.

Benefits volunteer

The benefits volunteer provides individuals with information and assistance on site to apply for specific government benefits, subsidies, and community programs. They help tax filers to access benefits and other financial supports they may not be aware of. The ideal benefits volunteer is someone who:

- Has previous CVITP volunteer experience
- Is familiar with provincial and federal tax benefits and other local or municipal programs available to people living on low incomes
- Has strong communications skills
- Is friendly and patient

Intake volunteer

The intake volunteer provides additional support for individuals when they arrive at the tax clinic. They assist taxpayers to fill in their intake forms and answer questions. If your clinic serves a high volume of people this position may be valuable. The ideal intake volunteer is someone who:

- Has previous CVITP experience
- Has strong communications skills
- Is friendly and patient

Evaluation volunteer

Many tax clinics undertake some form of data collection or evaluation, to understand the impact of the clinic. CVITP volunteers should keep track of the number of tax returns they complete as these figures may be requested from their CVITP Coordinator. Thus, having a dedicated volunteer to help log these figures can be beneficial.

Information Technology (IT) volunteer

An IT volunteer can help with the day-to-day technical support needed to operate a tax clinic – for example, monitoring internet connection, troubleshooting computer or printer problems.

Volunteer requirements

All CVITP volunteers must comply with CVITP guidelines, including confidentiality and privacy of information.

Confidentiality

Filing a tax return involves reviewing highly personal and confidential information, including income receipts, tax slips, social insurance numbers, and details about an individual's living situation. All CVITP volunteers must respect the confidentiality of individual information, as this is crucial to creating a secure, trusting environment in which the individuals are comfortable filing their taxes.

In order to participate in the CVITP, **all volunteers must either complete their volunteer registration online** or complete and sign Form T242, *Volunteer Information and Software Agreement*, which must be returned to your CVITP Coordinator. In the volunteer registration, the volunteer agrees to:

- Protect the individual's privacy
- Offer services free of charge
- Return income tax and benefit return to the individual
- Not keep any copies of an individual's income tax and benefit return (paper or electronic)
- Have the individual sign Form T1S60, *Taxpayer Authorization*, and **return** it to the individual.

The volunteer registration also requires all volunteers to **declare** that they have **never been convicted of a criminal offence** involving evasion in payment or remittance of tax, fraudulent transactions in which the public or any person is defrauded of property, money, or valuable security or service, or the possession of property obtained by crime or proceeds of crime.¹

¹Community Volunteer Income Tax Program: A Guide for Community Organizations, p 9.

Recruiting volunteers

Volunteers are the key to a successful community tax clinic. Recruiting volunteers can be challenging, especially for new clinics. Each community organization meets these challenges in their own way.

First, identify how many volunteers you are likely to need. Consider:

- How many tax preparer workstations you will have available at the same time
- How many days per week and hours per day you will be operating the clinic
- How many timeslots you will have available per tax preparer workstation (*30-60 minutes* is suggested for each tax return)
- How many volunteers you will need each day
- How many “back up” volunteers you would like to recruit in case of drop-outs.

Next, review the likely sources of volunteers in your community. These may include:

- Retirees
- Current or former accountants, financial planners, or business owners
- University or college students
- Social assistance staff
- Interested community members with relevant skills.

Outreach methods could include:

- Holding an information session to recruit volunteers
- Directly reaching out to key contacts
- Posting in local newsletters or email blasts
- Contacting your CVITP Coordinator who can help you contact interested volunteers in your area.

Reach out to key contacts in these areas, and when inviting them to volunteer also tell them:

- What the volunteer role(s) are and what kind of tasks are involved
- When you will need them to volunteer
- Where the tax clinic will be located
- A clear point of contact (phone # and/or email) for them to be in touch with you later
- When they will need to complete volunteer registration and EFILE registration/renewal
- When they will need to sign up for CVITP training.

Find out:

- How much time they are able to volunteer
- How much experience (if any) they have with tax clinics, tax preparation, or income tax
- Their contact information

Most tax clinics experience drop-off in volunteers at some stage, so it is wise to recruit more volunteers than you think you will need.

Volunteer training

Training is important for volunteers to feel confident and informed about their role, and to prepare them to accurately prepare tax returns for the clinic participants. Volunteers who have been well trained are more likely to be retained and to return in following years.

All community organizations registered with CVITP must participate in volunteer training delivered by the CRA CVITP team. The training covers the basics of income tax filing and how to prepare and submit a T1 tax return.

Please be aware that the CVITP training *does not include line-by-line training*; instead, training modules cover various tax-related topics and how to report common slips. There is also a live UFile training presentation available as well.

Many community organizations supplement the CVITP training with additional sessions. This supplemental training could include:

- Additional tax preparation practice with local community examples in mind
- Role play to rehearse conversation skills, greeting, interviews
- Data collection practices you will be using at your site.

Training that includes hands-on practice in preparing a tax return will also reduce the volunteers' fears or anxiety about the process. When possible, include experienced volunteers as mentors throughout the training and tax clinic process, to help guide new volunteers and answer questions.