

Dane County Free Tax Assistance Project

- Named the Richard Dilley Tax Center in memoriam for Rick Dilley, DOR state volunteer program leader in 2012
- Located in the Village on Park Center on South Park Street




Extension's Role....



- Facilitate partnership between DOR, IRS, Volunteer Tax Site Coordinator, AARP and the City of Madison
- Coordinated and implemented all COVID 19 preventative procedures and shared plans with UW Madison and Dane County Public Health
- Researched and implemented the online appointment system and Google Voice appointment phone line
- Recruited, schedule and managed volunteers
- Answered dedicated phone line to field taxpayer questions before, during and after tax season
- Continue to work with taxpayers to trouble shoot ongoing tax issues
- Raise funds for supplies, equipment

Changes Due To The Pandemic

- Changed format
 - From walk-in, first come, first served to appointment only
 - Used Sign Up Genius as online alternative
 - Set-up Google Voice phone number for those with no computer access
 - Extension staff manned that line
- Limited number of bodies in all areas
- Kept tax preparers separate from the public
- Incorporated plexi-glass dividers between the public and the intake interviewers, upheld mandatory mask requirements and practiced sanitizing policies between interviews.



← Marketing Brochure

Changes were communicated through:

- United Way 2-1-1
- City of Madison Financial Navigators
- Local Libraries
- Human Services
- DOR
- Dane County Extension Website
- Word of Mouth
- Signs

Results

Number of Returns Filed

2020: 2,177
2019: 150

Filing Status Breakdown

Single: 74% Married, Filing Jointly: 15%
Head of Household: 11%

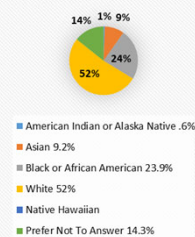
75% of Taxpayers That Filed Received Federal Refunds totaling \$3.14 million

Note: Those refunds include those who did not receive one or both Economic Impact Payments. Some taxpayers who filed in February and March may receive additional refunds after the IRS adjusts returns for unemployment compensation and the removal of the Excess Advance Payments for the 2020 Premium Tax Credit

86% of Taxpayers That Filed Received State Refunds totaling \$1.26 million

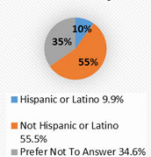
Demographics

Race



9% of Taxpayers Identified As A Veteran

Ethnicity



24% of Taxpayers (Or a Member Of Their Family) Identified As Having a Disability

Challenges



- Total number of returns was down
- Total number of alternative sites was down
 - AARP had 5 fewer sites this year (total of only 9 with very limited hours) and did 2,000 less returns than previous years
- Taxpayers were not sitting with preparers as their taxes were done
- Some taxpayers that were used to the old system were not able to get their taxes done because appointments were taken
- No-shows
- Costs were higher

Next Year...

- Use a Hybrid system of appointments and walk-ins
- Continue to use Sign-Up Genius for online appointments
- Set up a volunteer-run phone appointment registration system
- Go back to having taxpayers directly interacting with preparers as their returns are completed
- Work with the Road Home and Centro Hispano to recruit more Spanish speaking volunteers
- Re-vamp the location logistics due to upcoming demolition of space for parking ramp