

Building a High Performing VITA Site

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Building a High Performing VITA Site Planning

- **Consult other VITA Center and Asset Building Networks**
- **Set realistic targets, goals and expected results for VITA Center's operations early on**
- **Obtain sufficient resource commitments to support implementation**

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Planning

- **Begin recruiting potential Volunteers early**
- **Timing is crucial. VITA Centers operate on a set timeline, from January to mid-April each year. Sufficient time must be allocated to plan for implementation**
- **Identify a person or small team to serve as the coordinating unit for the Site**

Building a High Performing VITA Site Planning (cont.)

- **Staff VITA sites with highly trained tax preparers, including those who can speak the languages of the target population**
- **Ensure that your VITA Site is conveniently located and welcoming**



Building a High Performing VITA Site

Volunteer Recruitment Campaigns

- **Warm body-** spread the message to everyone - no control on quantity or quality
- **Targeted** - specific skills, commitment or character trait



Building a High Performing VITA Site Volunteer Recruitment Campaigns (cont)

- **Combination Recruitment – warm body and targeted**
- **Concentric- Individuals connected to the Weed and Seed initiative - volunteers recruited by current volunteers**



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Rules for effective recruitment:

- **Actively seek the skills the position requires**
- **Be honest – do not cover up or downplay the task as unimportant, the “anybody can do it syndrome”. (Why should I do it if just about anybody else could?)**



Building a High Performing VITA Site Rules (cont.)

- **Recruit year round – plant the seeds early**
- **Use many different recruitment techniques. Be sure to consider the entire community. Go to places where people congregate**

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Where to Look

- **Non-profit organizations**
- **Schools and colleges**
- **Corporate Newsletters**
- **Retiree programs**
- **Corporate outplacement Programs**
- **Churches, synagogues and other places of worship**



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Where to look (cont.)

- **Career counseling centers**
- **Civic clubs, fraternal societies, sororities**
- **Governmental organizations**
- **Volunteer recruitment fairs**
- **Car, real estate, mortgage and retail companies**
- **Financial Institutions**
- **United Way**



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Marketing and Outreach

- **Define the message for each audience**
- **The message should be inviting and encourage people to become involved with the VITA Site**
- **Find a “VIP” champion**



Building a High Performing VITA Site Marketing and Outreach (cont)

- **Develop a media strategy that complements the outreach and educational activities utilizing the following:**
 - **Flyers**
 - **Radio/TV advertisement**
 - **Community/neighborhood newsletters**

Building a High Performing VITA Site Marketing and Outreach (cont)

- **Direct mail**
- **Door-to-door campaign**
- **Flyers in payroll envelopes**
- **Church and corporate bulletin boards**



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Lessons Learned

- **Recruit people who are computer literate**
- **Have regular meetings with volunteers**
- **Volunteer training should be continuous**
- **Have flexible orientation sessions**
- **Develop volunteer schedules**
- **Everywhere you go talk about VITA**



Building High Performance VITA Sites

Lessons Learned (cont.)

- **Establish a backup plan for technical problems**
- **Prepare for peak customer waves**
- **Prepare for clients who have literacy concerns**
- **Know the demographics of the community**
- **Maintain a list of other VITA Sites**

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Lessons Learned (cont.)

- **Commit TAXWISE telephone number to memory**
- **Screen, Screen and Screen clients**
- **One to two people should be assigned to schedule appointments**



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Lessons Learned (cont.)

- **Post the volunteer schedule online**
- **Have a play area for kids!!!**
- **Provide refreshments when possible**
- **Everyone has a story, remember what you can and cannot do in your VITA Site**



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Q & A



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