

Salesforce Platform Empowers VITA (Volunteer Income Tax Assistant)

iMission's Expertise Helps Bring \$30 Million to Low Income Families During The Covid Pandemic

A SALESFORCE FOR NONPROFITS CASE STUDY

The Earned Income Tax Credit (EITC) is the largest anti-poverty program in the U.S. for low-income working families. At the Federal level, upwards of \$63 billion is available each year. These credits do not offset taxes due, but instead result in additional cash benefits paid directly to qualified low-income individuals through the IRS. Many states also provide EITC payments, increasing the funds available to help families pay rent, buy food, and get health care.

In fact, each year EITC lifts over 5.5 million people above the poverty line, including nearly 3 million children. Add in the covid-era Child Tax Credit (CTC) that was also paid through the IRS tax system, and millions more were moved out of poverty while providing supplement income to even millions more.

To access these much-needed funds, people need to file taxes with the IRS.

The good news is that the IRS's Volunteer Income Tax Assistance (VITA) Program supports free tax filing services through the Volunteer Income Tax Assistance Program (VITA). Thousands of trained and certified volunteer tax professionals swing in action each to help families meet the tax filing deadline. VITA volunteers are located in public libraries, community centers and community-based nonprofits across the country.

But on March 12, 2020, six weeks before the April 15 tax filing deadline, COVID shut down the VITA sites. In Connecticut, more than 8,000 households who had used the VITA services in the prior year still had not filed.

A team of volunteers, led by a VITA area coordinator Patrick Gentile, took action. With Salesforce consulting and implementation support from iMission, a virtual VITA approach was launched.

Over the next year, a new nonprofit, SimplifyCT, was formed by these volunteers.

With financial support from national organizations like [Share Our Strength](#), Federal Agencies including the Internal Revenue Service and the Department of Health and Human Service, and state agencies, SimplifyCT moved onto the national stage. During the pandemic, the SimplifyCT volunteers helped to secure over \$30 million in payments to working families.



"When COVID shut down our in-person operations, we needed a new way to connect our clients and volunteer tax preparers. We called iMission and, within a few weeks, a Salesforce communication hub was activated – with a call center, texting, and email."



Pat Gentile
Founder
SimplifyCT

BASELINE SALESFORCE TECHNOLOGY FOR VIRTUAL TAX PREPARATION SERVICES

Salesforce is a powerful and flexible platform with many tools and applications to meet the unique needs of a nonprofit.

Within days of the Covid shutdowns, Slack, a Salesforce application, was launched to allow volunteer tax preparers to coordinate activities and provide each other with the technical tax advice for more complex filings.

A call center was also created in the early weeks. Powered by the Salesforce Service Cloud with outbound and inbound phone and texting capabilities, rapid outreach to the 8,000 households who had not yet filed was organized and expedited.

A form-builder application with document upload capabilities allowed for a pre-approval process for eligibility. It also delivered client information to volunteers.

Together, these capabilities created effective virtual solutions, allowing clients and volunteers to connect remotely and complete the tax filings.

Weeks later, the Salesforce Program Management Application was put into action, allowing the SimplifyCT team to engage and build relationships with clients. This provided important information on the immediate tax filing requirements. It also served as a critical resource follow-up engagement as new Covid-relief funding bills were passed by Congress over the following 24 months.

ENHANCING POST-PANDEMIC CLIENT SERVICE

As the worst of the pandemic passed, traditional VITA sites reopened. SimplifyCT used its Salesforce platform to enhance client services. An on-site scheduling application was added to the SimplifyCT Salesforce platform. This served to significantly reduce the wait-time for clients. Text messaging from within the Salesforce platform provided appointment confirmation and rescheduling. The texts also provided clear guidance on what information the client would need to have for the volunteer to complete the tax filing.

SimplifyCT has continued to pilot other services that draw on the Salesforce nonprofit CRM and virtual connections with trained volunteers. For example, a partnership was formed with the state of Connecticut to streamline and enhance winter heating subsidies.

ADDRESSING THE EITC GAP THROUGH DIGITAL ENGAGEMENT

Despite the poverty-fighting success of the EITC, about twenty percent of the individuals who are eligible for this important benefit do not apply for it and therefore do not receive the benefit.

The Salesforce-powered processes that SimplifyCT has developed has provided opportunities to address the EITC application gap. These processes enable SimplifyCT to partner with other front-line nonprofits, including organizations serving often hard-to-reach populations. SimplifyCT has partnered with homeless shelters, immigrant services, and legal aid organizations. These organizations have become trusted navigators, connecting people in their communities to the skilled and compassionate VITA volunteers.



"Between 2020 and 2022, we secured over \$30 million in refunds including Child Tax Credits, COVID relief funding, and Earned Income Tax Credits."



Pat Gentile
Founder
SimplifyCT



"The SimplifyCT successes are a clear example of the power of digital solutions and Salesforce specifically to empower nonprofits of all sizes to better serve and support the people most in need."



Rob Leighton
Executive Director
iMission

ABOUT IMISSION INSTITUTE

iMission is a full-service New Haven-based marketing and stakeholder engagement agency working exclusively with mission-driven organizations. We are proud to be a leading nonprofit CRM consultant offering expertise in CRM architecture, workflow process solutions, and client training. Our team has deep experience in Salesforce's Nonprofit Success Pack (NPSP), Marketing Cloud, Experience Cloud, Service Cloud, Education Cloud, Marketing Cloud Account Engagement/Pardot, Einstein Artificial Intelligence (AI), data integrity, and dozens of application integrations. We support and grow our clients' capabilities in advocacy, case management, donor management, grants management, community portals, automated communications, and more. Our clients include nonprofit organizations, health systems, school districts, municipalities and social enterprises. [Contact us](#) to learn more about how we can assist your organization today!



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