

2025 LOGIC MODEL - VITA

INPUTS

- Volunteers
- IRS Training & Certification materials and software
- Facility including waiting area, reservation area, interview/data input area
- IRS licensed software on remote servers operated by IRS contractor
- Equipment including computers, printers, Wi-Fi hotspot, phones, power cords, etc.
- Phone and Wi-Fi services
- Taxpayers with documents
- Reference and training publications
- Office supplies including paper, toner, intake forms & envelopes
- Publicity via flyers, websites, newspaper
- Funding from United Way & donations

ACTIVITIES

- Volunteer training & certification
- Schedule appointments including a review via phone of situation to ensure within scope of service
- Greet and screen clients to ensure they have necessary documents
- Conduct in-depth interview, prepare tax returns (federal and/or state(s)), and perform independent quality review of returns
- File returns and correct errors identified by IRS
- Assist taxpayers with other questions and issues
- Establish and maintain programs, MOUs, and budgets
- Prepare site operations and security plans as required by IRS
- Obtain over the phone interpreter service from IRS

OUTPUTS

- Volunteers prepared and certified to prepare income tax returns
- Accurate individual income tax returns prepared, approved by taxpayers, and submitted to IRS and state(s)
- 2025 site operations and security plans approved by IRS
- MOU with City of Aiken in place for the use of the facility
- Other tax issues and questions resolved for taxpayers

OUTCOMES

- 28 certified volunteer tax preparers ready to volunteer in 2025
- Accurate filing of 1069 federal tax returns with only a 1.3% error rate and 1303 state returns with a 0% error rate!
- Taxpayers pay minimum required tax while receiving maximum legal refunds and tax credits free of charge
- Other issues resolved for taxpayers including identity theft problems, correction of investment errors with tax consequences, and communications from the IRS