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Free tax service found ways to stay open to community during pandemic

When the pandemic hit earlier this year, Jackie Zolp and her Goodwill Northcentral Wisconsin Volunteer Income Tax Assistance (VITA) program team were well into the 2020 tax season.

Zolp coordinates the Goodwill VITA site—one of about 200 sites in Wisconsin—where they help qualifying taxpayers with free income tax preparation services.

The 50-person volunteer force started the 2020 tax season in January as usual with classes in preparation to work one-on-one with taxpayers. Everything was smooth until early March when news of the pandemic's spread became real, and businesses and organizations started looking to scale back and shut down.

"We had 27 of our 50 volunteers continue on at that point," said Zolp, as some volunteers decided to sit out the season for safety concerns. Of the 27 who stayed, some chose to work behind the scenes during morning hours entering and reviewing tax returns before taxpayers arrived.

Another shift from normal business practices at the site was a move from in-person to mostly virtual tax preparation services. One-on-one walk-in meetings with taxpayers were replaced with taxpayers stopping at the Goodwill VITA site at appointed times to drop off tax documents and give necessary information. The new appointment system improved safety by creating a constant flow of visitors to and from the site, reducing backups and people waiting in proximity of one another. Volunteers and staff followed sanitizing and social distancing etiquettes. Preparers worked tax returns alone and questions once answered by the taxpayer sitting across the table from them now occurred over the phone through a secure password process.

But even with all the new safety precautions, uncertainty remained. "We knew things might shut down," said Zolp, adding that the uncertainty motivated volunteers. "They put in so many hours so we could do as many returns as possible, knowing there might be a shutdown."

The next shift came when Wisconsin's "Safer at Home" order went into effect in late March. When the site closed, the team immediately began to work on a plan to reopen and continue providing service under the new guidelines. "We needed something secure that limited taxpayer and volunteer contact while serving as many people as we could." The solution was to reopen with appointed drop-off and pick-up times along with masking and other safety precautions. To further limit exposure, they scaled back the team to two volunteers and two staff members. Even with the limited crew, they processed an impressive 313 returns from March 16 to July 15.

The 2020 tax season provided many takeaways and opportunities to try techniques they may have otherwise never considered. Zolp says she will meet with volunteers before next tax season to consider techniques they can use moving forward. "It may be a hybrid system where those comfortable using technology can work virtually while we still offer in-person services for others." Whatever changes, she says she is proud of what they accomplished this year and is optimistic for a return to normal.

The VITA program is a cooperative effort by the IRS, non-profit organizations including Goodwill Industries and many individual states, including Wisconsin. Volunteers trained by the IRS and the Wisconsin Department of Revenue prepare basic income tax returns free for qualifying taxpayers.

