



Oweesta's 2022 Native Financial Education Practitioners Summit
Best Practices in Starting and Maintaining a Thriving VITA Site
April 26, 2022



Today's Presenters

- **Patsy Schramm**, (Cherokee Nation) Oklahoma Native Assets Coalition (ONAC) Native EITC/VITA Network Coordinator edgpj@aol.com
- **Christy Finsel**, (Osage Nation) ONAC Executive Director cfinsel@oknativeassets.org
- **Melanie McFalls**, (Walker River Paiute Tribe) Tax Administrator, Fallon Paiute-Shoshone Tribe (Fallon, NV)- taxdirector@fpst.org
- **Stephen Highers**, (Cherokee Nation) Small Business Assistance Center Director, Cherokee Nation Commerce Services- stephen-highers@cherokee.org
- **Claudia Adams**, IRS Senior Relationship Manager Tax Consultant in SPEC Growth Territory 107 (Charlotte, NC) claudia.a.adams@irs.gov
Elizabeth Skiba, IRS SPEC Manager, Growth Territory 107 Elizabeth.L.Skiba@irs.gov



Oklahoma Native Assets Coalition, Inc. (ONAC)

Christy Finsel

Citizen of the Osage Nation

Executive Director

Oklahoma Native Assets Coalition, Inc.

cfinsel@oknativeassets.org

www.oknativeassets.org





The Oklahoma Native Assets Coalition, Inc. (ONAC) is an American Indian-led nonprofit Native asset building coalition that collaborates with Native nations and other interested partners to offer Native-led and culturally compatible asset-building programs and initiatives in Native communities. The coalition, started in Oklahoma and headquartered in Oklahoma City, has existed since 2001, and was classified by the Internal Revenue Service as a 501(c)(3) nonprofit in 2014. ONAC focuses on promoting culturally responsive asset-building strategies and serves Native communities on a national level.

www.oknativeassets.org

Overview: ONAC's Interrelated Asset-Building Programs and Initiatives

- Founded in Oklahoma as a grassroots coalition in 2001 – became a 501(c)3 in 2014, and has served as a nationwide nonprofit since 2018
- Current Native-specific programs and initiatives include:
 - Provides free training & TA
 - Coordinates two national Native networks: Native Bank On ONAC and the National Native EITC/VITA Network
 - Intermediary funder: Mini-grant program (62 grants awarded to Native partners, since 2014, for a total of \$437,900, in AK, AZ, ME, MN, MT, NC, NV, OK, SD, TX, and WI)
 - Conducts national Native asset building research
 - Offers resource guides: Investor education, Native-specific financial ed for youth, Native women entrepreneurs, providing remote financial education and VITA during the pandemic
 - ONAC directly administers: national Native financial coaching to AIAN registrants; Children's Savings Account; Emergency Savings Account; down payment assistance; and emergency cash assistance programs





ONAC Support of Free Tax Preparation and Integrated Asset Building

- As part of its grants program, ONAC has awarded grants to sixteen Native VITA programs to support their VITA programming, and resources to one of those grantees to also seed fund Children's Savings Accounts.
- During the past three years, ONAC has worked to link Bank On accounts (safe and affordable bank accounts) to VITA programming, as well as to connect financial coaching, down payment assistance, and emergency cash assistance to taxpayers.
- For those able to file their own simple returns, ONAC partners with the IRS to promote On-Line Taxes, Inc.
- Administration of the ONAC Native EITC/VITA Network.



ONAC-Provided Resources Available to VITA Clients in Native Communities

- [On-Line Taxes, Inc.](#) (link for those in a position to file their own simple returns, in case VITA resources are not near to them)
- [Providing remote and socially distanced Native VITA services](#)
- [National Resource Guide to Support Native Women Entrepreneurs](#) (may assist VITA clients)
- [Several entities providing Native VITA services also offer Native Children's Savings initiatives](#) (documenting models that work)
- [Native Bank On ONAC resources](#) (helping tribal citizens open safe and affordable bank accounts to hold tax refunds)
- [Free financial coaching for American Indians and Alaska Natives in the U.S.](#) (registration form available in this link, the coaching is free and available to those to whom you provide financial education and VITA services)
- [ONAC Going Remote Resource Guide and Video](#) (providing remote Native-specific financial education)



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Patsy Schramm

Citizen of the Cherokee Nation

ONAC Native EITC/VITA Coordinator

edgpj@aol.com

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ONAC Native EITC/VITA Network

- The ONAC Native EITC/VITA Network is comprised of Native VITA site coordinators and advocates. The purpose is to share resources and opportunities, to provide a platform for interaction among Native site coordinators (American Indians, Alaska Natives, and Native Hawaiians), and to bring concerns from Native VITA sites to appropriate parties. We have been instrumental in arranging scholarships for Native site practitioners to attend TON conferences and give priority in our recommendations to those listed in our directory.
- The network has 191 participants. Some participants share information of interest to benefit other network members. We are usually able to help answer questions or steer in the proper direction to obtain answers.



ONAC Research: Providing Remote and Socially Distanced Native VITA Services

- ONAC generated a handout, with information provided by ONAC grantees, regarding how they delivered remote and/or socially distanced Volunteer Income Tax Assistance (VITA) services during the 2020 tax season and shutdowns associated with the COVID-19 pandemic.
- Due to necessity, both tax preparers and filers are now using technology that they may not have used before to successfully complete remote tax filings. While providing VITA services to their local Native communities, these Native-led VITA programs are striving to keep both the preparers and filers as safe as possible.
- We hope this information might be useful to those providing Native VITA services.
- A big thank you to the Native VITA programs that shared their innovations.

Handout: [Providing remote and socially distanced Native VITA services](#)



Taxpayer Opportunity Network (TON)

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- TON is sponsored by Prosperity Now and provides a wealth of resources for volunteer tax preparers.
- Melanie McFalls and Patsy Schramm serve on the TON Steering Committee.
- To join: <https://prosperitynow.org/get-involved/taxpayer-opportunity-network>
- Through participation in TON, ONAC is able to bring issues impacting Native VITA sites to appropriate parties.

TON resource examples are:

- Alternative Tax Prep Option
- VITA-Train
- Tax Prep Dispatch
- Tax Roundtable Listserv



EITC & CTC Resources

The Center on Budget and Policy Priorities provides numerous resources.

- <https://www.taxoutreach.org/>
- <https://www.taxoutreach.org/outreach-strategies/native/>



Joining the Native EITC/VITA Network

To support the broader Native EITC/VITA programs, ONAC administers the national Native EITC/VITA Network. To join the Network, go to <https://www.surveymonkey.com/r/ONACVITA>.

For further information about Native VITA, EITC, and the Native EITC/VITA Network, contact Patsy Schramm (*Cherokee Nation*), ONAC Native EITC/VITA Network Coordinator, at edgpj@aol.com.



Stakeholder Partnerships, Education & Communication

IRS VITA/TCE Volunteer Programs

Stakeholder Partnerships, Education and Communication



**Stakeholder Partnerships Education &
Communication (SPEC)**

Stakeholder Partnerships Education & Communication (SPEC)
Claudia Adams, Senior Stakeholder Relationship Tax Consultant
claudia.a.adams@irs.gov

Desk: 704-548-4422

Gov't Cell: 704-281-4649



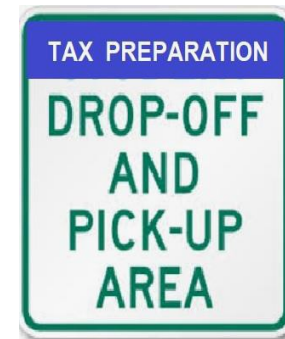
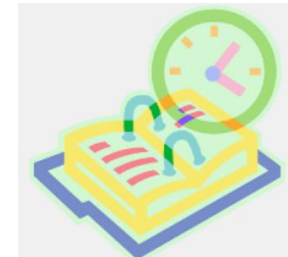
You Can BE the Difference

- **Community Impact**
- **Impacting Families**
- **Serving for a Cause**



Types of VITA/TCE Services

- Face-to-Face (Walk-in/appointment)
- Virtual
- Drop-off and Pick-up
- Facilitated Self-Assistance (FSA)





inVITA Friend to Join the Cause

- **We hope that you will also “inVITA” a friend to join you!**
- **When you “inVITA” a friend to join you as a VITA/TCE volunteer, you can celebrate each other’s successes.**
- **Strengthen your friendship through shared service to the community!**

Email us at: WI.VITA.TCE.Growth107@irs.gov





Interested in Becoming a VITA Volunteer or Partner?

For additional information and next steps, submit your [inquiry now using the VITA/TCE Volunteer and PartnerSign Up](#)

- **We will share your volunteer interest with sponsoring organizations in your area for follow-up contact.**
- **If you have an interest in partnering with us to sponsor or host a free tax preparation site in your area you can [also complete and submit the VITA/TCE Volunteer and Partner Sign Up and we will be sure to follow-up on your inquiry.](#)**

<https://www.irs.gov/individuals/irs-tax-volunteers>



IRS Free File Services

- **The purpose is to promote community awareness for IRS Free File & VITA Services.**
- **Free File: Do your Federal Taxes for Free, <https://www.irs.gov/>**
- **IRS Free File** lets you prepare and file your federal income tax online for free. File at an IRS [partner site](#) with the IRS Free File Program or use Free File Fillable Forms. It's safe, easy and no cost to you. <https://www.irs.gov/filing/free-file-do-your-federal-taxes-for-free>

What Is IRS Free File?

The IRS Free File Program is a public-private partnership between the IRS and many tax preparation and filing software industry leaders who provide their brand-name products for free. It provides two ways for taxpayers to prepare and file their federal income tax online for free.





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- The IRS Free File Program is a public-private partnership between the IRS and many tax preparation and filing software industry leaders who provide their brand-name products for free.
- It provides two ways for taxpayers to prepare and file their federal income tax online for free:

Pick an option based on your income

Income \$72,000 and below:

- Free federal tax filing on an IRS partner site
- State tax filing (free with some offers)
- Guided preparation – simply answer questions
- Online service does all the math

[Choose an IRS Free File Offer](#)

Income above \$72,000:

- Free electronic forms you fill out and file yourself
- No state tax filing
- You should know how to prepare paper forms
- Basic calculations with limited guidance

[Use Free File Fillable Forms](#)





Stakeholder Partnerships Education & Communication (SPEC)

Thank You!





Questions and Further Discussion

