



# 2026 Volunteer Handbook



[volunteer.cwfphilly.org](http://volunteer.cwfphilly.org)

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## Introduction to Campaign for Working Families (CWF) and VITA

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### CWF's Mission

Campaign For Working Families Inc., mission is to build and champion the financial well-being and economic mobility of individuals and families by leading programming and advocating for policies, initiatives, and support systems that ensure equitable opportunities and financial stability. CWF is driven by the belief that every individual and family deserve respect, dignity, and the tools/information to succeed, and CWF is committed to enacting positive change at

both the policy and grassroots levels by fostering a culture of empathy, data-driven decision making, and collective action.

As a VITA volunteer, you play a crucial role in helping us achieve our mission and realize our vision. Your dedication and commitment make a meaningful difference in the lives of those we serve, empowering them to achieve financial stability and pursue their dreams. Thank you for being an integral part of the Campaign for Working Families team and for contributing to the betterment of our community.

## Overview of the VITA Program (Volunteer Income Tax Assistance)

The Campaign for Working Families (CWF) VITA program is an initiative aimed at providing free tax preparation assistance to low-to-moderate-income individuals and families in the city. VITA stands for Volunteer Income Tax Assistance, and the program is a crucial part of CWF's efforts to promote financial stability and economic empowerment in the community.

The VITA program is run by CWF staff, seasonal employees, and a team of trained and dedicated volunteers who are certified by the Internal Revenue Service (IRS). These volunteers offer their time and expertise to help eligible taxpayers navigate the complexities of tax preparation and ensure that they receive all the tax credits and deductions they are entitled to.

Key features of the Campaign for Working Families VITA program include:

- **Free Tax Preparation:** The program offers free tax preparation services to individuals and families with limited financial resources. This eliminates the cost burden associated with professional tax assistance, helping low-income taxpayers retain more of their hard-earned money.
- **Maximizing Tax Benefits:** The VITA volunteers are well-versed in the tax laws and regulations, ensuring that taxpayers receive all the eligible tax credits and deductions available to them. This includes credits like the Earned Income Tax Credit (EITC) and the Child Tax Credit, which can significantly boost a family's income.
- **Convenient Locations:** CWF operates multiple VITA sites across Philadelphia and southern New Jersey, strategically located in neighborhoods with high concentrations of low-income residents. This accessibility ensures that eligible taxpayers can easily access the services without having to travel far.
- **Language and Cultural Sensitivity:** The VITA program takes into account the diverse demographics of Philadelphia's population. Volunteers often speak multiple languages, and the program is designed to be culturally sensitive, making it more inclusive and supportive of all community members.

- **Financial Education:** In addition to tax preparation, the VITA program aims to promote financial literacy and education. Volunteers offer guidance on budgeting, saving, and making informed financial decisions to empower individuals and families on their path to financial stability.
- **Collaborative Partnerships:** CWF collaborates with various community organizations, schools, churches and local government entities to extend the program's reach and impact. These partnerships help identify and serve those who may benefit the most from the VITA services.

## Understanding Volunteer Roles

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### **Greeter:**

Greeters are essential to creating a welcoming environment at our tax sites. These volunteers greet clients as they come in and maintain a sign-in sheet to ensure CWF tax sites flow smoothly. Greeters may only be needed at the larger supersites that handle a high volume of taxpayers. Sometimes the Intake Specialists do not have time to greet the taxpayers, because they may be actively interviewing a taxpayer. The greeter also serves as someone who can help manage a large crowd and make sure taxpayers are comfortable and can find restrooms, water, or snacks. They may also help boost morale when taxpayers are waiting to be seen.

### **Tax Preparer:**

Tax Preparer volunteers work one-on-one with individuals and families to electronically prepare tax returns — whether virtually or at an in-person tax site. Tax Preparers complete certification exams that denote which types of returns they are trained to prepare. Basic certified Tax Preparers prepare simple tax returns, while Advanced certified (or higher) Tax Preparers prepare both basic and more complex tax returns (e.g., Schedule C) as stipulated by the IRS and publication 4012. Advanced certified Tax Preparers can also serve as Quality Reviewers.

### **Intake Specialist:**

Intake Specialists are the first stop for clients at our sites. These volunteers help guide taxpayers through the IRS intake forms, determine their eligibility for our services, and ensure taxpayers have all required documentation. Intake Specialists are also responsible for compiling a client's file and uploading it to the Hub.

### **Quality Reviewer:**

Quality Reviewers perform an important role by ensuring each tax return is prepared correctly and accurately as stipulated by the IRS and publication 4012. Once a return has been prepared by a Tax Preparer, a Quality Reviewer reviews the return for mistakes and oversights. Quality Reviewers then meet one-on-one with clients to go over and finalize the return, answering any

questions or concerns a client might have. Quality Reviewers cannot review returns they have prepared themselves. You must be certified at least Advanced and assigned this role by a member of the Site Team.

### **Translator:**

Translators assist non-English speaking clients at our tax sites. Translators must be fluent in a language other than English and, while not responsible for preparing tax returns, must have enough working tax knowledge to be able to communicate the information clearly and effectively to the client.

### **Financial Coach:**

Financial Coaches provide personalized guidance and support to individuals or families seeking to improve their financial well-being. In this role, volunteers assess a client's financial situation, including income, expenses, debt, and savings, and help them create a customized financial plan to achieve their goals. The coach offers expertise in budgeting, saving, investing, and debt management, aiming to educate and empower clients to make informed financial decisions.



### **Virtual Volunteers**

For our virtual operations, we recruit volunteer Tax Preparers, and Quality Reviewers. Additional training is required to volunteer virtually (see Volunteer Training and Certification below).

## **The Volunteer Portal**

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The most important site volunteers will use while working with CWF is the [CWF Volunteer Portal](#). This is a hub of information where volunteers can learn about the training and certification process as well as register for events, and volunteer shifts. The portal also serves as a database for volunteers and CWF staff to track hours shift attendance. This portal is accessible via your web browser and also as an app you can download to your phone. You can use this app to easily sign in for shifts when you arrive at the tax site.



## Volunteer Training and Certification

### Volunteer Training Process Infographic



## Training Instructions, Resources and Tools for volunteers.

All information regarding VITA training, including study guides, practice scenarios, supplemental modules, and more, can be found on the [Training page](#) on CWF's main website. This page is updated regularly.

### In-Person Volunteers

Starting in 2026, in-person volunteers will be required to use *Get Your Refund*, similarly to how it is used in the virtual volunteer process. Volunteers will learn how to use this during CWF's Volunteer Orientations, which will be held virtually during the week of January 19<sup>th</sup>, 2026.

### Virtual Volunteers

All virtual volunteers must complete the following additional training courses prior to their first shift:

1. [Intake Specialist \(Hub training\)](#)
2. [Tax Preparer \(Hub training\)](#)
3. [The Virtual Tax Prep Process \(Coassemble\)](#)
4. [How We Use Slack \(Coassemble\)](#)

Virtual volunteers will also be asked to attend a Volunteer Orientation where they will learn more about the virtual process and how to use *Get Your Refund*.

### Quality Reviewers

CWF encourages experienced volunteers who are advanced certified to become Quality Reviewers. As a Quality Reviewer, you'll play a vital role in ensuring that every return prepared is accurate, compliant with tax laws, and error-free. Your attention to detail and passion for helping others will directly impact families and individuals in your community!

To certify as a Quality Reviewer, one must complete the "Quality Review" Coassemble module and shadow a manager while they prepare at least three returns. You can find training info on the CWF [Training page](#).

## Site Operations

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### Scheduling Volunteer Shifts

Volunteers may serve as many hours as they like but are **expected to serve a minimum of 30 hours over the course of the tax season (January through April)**. Volunteers who live in Philadelphia are expected to volunteer a minimum of 15 hours in-person at a tax site. This helps meet the increased demand of taxpayers who need to file in-person. As a rule, we ask

volunteers to sign up for shifts two weeks in advance to help the Site Managers prepare for the shift and arrange for extra support if needed. However, we always accept last-minute volunteer sign-ups.

[Click here to schedule volunteer shifts!](#)

## Finding and choosing a VITA site

CWF has established partnerships with numerous local churches, community centers, schools, and more to operate our tax sites. These strategically located sites are spread throughout the city, making it convenient for both taxpayers and volunteers to access our services. To help volunteers find the most suitable tax site, we offer a user-friendly [Volunteer Portal](#). This portal allows volunteers to filter tax sites by location, ensuring that they can easily find a site in their neighborhood. Additionally, volunteers can further refine their search by filtering sites that operate during their available hours, ensuring a seamless match with their schedule. You can see an overview of the different areas by selecting the “[Locations](#)” page on the Portal. If, for any reason, you can't find a nearby site or have questions about the process, our dedicated volunteer team is always ready to assist you.

## Attendance and Punctuality

If you cannot attend your registered volunteer shift, please cancel the shift in the [Volunteer Portal](#) and notify your Site Manager ASAP via call, text or email. If emailing, please copy [taxvolunteer@cwfphilly.org](mailto:taxvolunteer@cwfphilly.org). We ask that you give at least eight hours' notice if you cannot attend your scheduled volunteer shift.

[Click here to cancel a volunteer shift](#)

If you are habitually late or absent for your scheduled volunteer shifts, your site manager may ask to meet with you to discuss how to better manage your schedule. You are also encouraged to email [taxvolunteer@cwfphilly.org](mailto:taxvolunteer@cwfphilly.org) for help managing scheduling volunteer issues. Someone from the volunteer department will be in touch with you within 48 hours to answer questions or give suggestions about alternative tax sites and hours.

## Dress Code and Appearance Guidelines

All volunteers will receive a free CWF t-shirt. We encourage you to wear this shirt while volunteering, but it is not mandatory. You may dress comfortably but please ensure that attire is clean, neat, and respectful. Please refrain from wearing clothing that is excessively revealing or has any political messages. We trust your judgement to adapt your attire based on the specific tax site you are volunteering at, keeping in mind the diverse range of clients we serve.

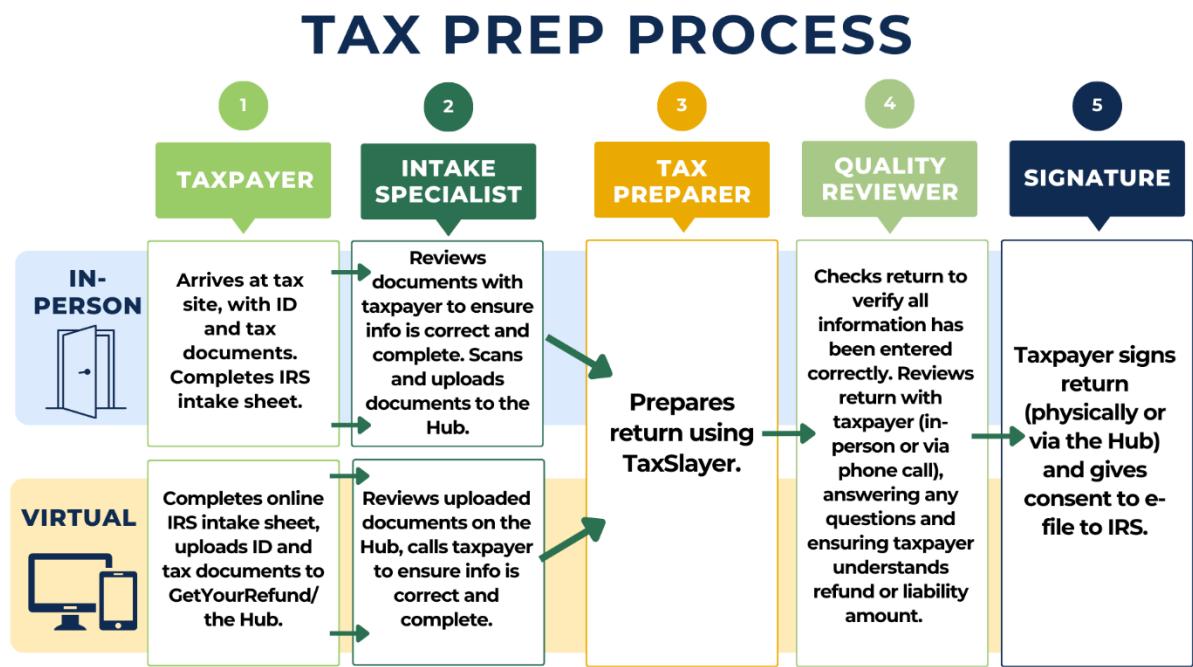
## Food and Breaks

During your shift, you are encouraged to take a 15-minute break if needed, ensuring you have time to recharge. While assisting taxpayers with tax returns, we kindly ask that you refrain from

eating and using your phone for calls. This ensures a focused and respectful environment for both you and the taxpayer. Please reserve phone calls and snack breaks for designated break times or when there is downtime at the site. Your cooperation with these guidelines is greatly appreciated as it contributes to a smooth and professional experience for everyone involved.

## Typical site set-up and flow

This infographic illustrates the tax prep process for both in-person and virtual tax sites.



## Taxpayer Interaction and Communication

### Building Rapport with Taxpayers

Establishing a genuine rapport with taxpayers is not just a skill; it's a cornerstone of our mission. As VITA volunteers, we hold the responsibility of ensuring that each interaction is infused with empathy, respect, and a willingness to listen. Every taxpayer has a unique story, and by acknowledging their individuality, we not only ease their tax-related concerns but also create an atmosphere of trust and comfort. Whether it's a first-time filer or a returning client, our ability to empathize, explain processes clearly, and address questions with patience will not only enhance the quality of our service but also empower taxpayers to navigate the tax landscape with confidence.

### Handling Difficult Conversations and Disputes

While assisting taxpayers, it's important to recognize that emotions can run high, and individuals may occasionally become upset or frustrated, especially if their expectations aren't

met. If you encounter a taxpayer who appears visibly angry, confrontational, or unwilling to accept the situation, we have a structured approach for handling such conflicts. Your role is to ensure that every interaction remains respectful and constructive. If you find yourself in a situation where a taxpayer's emotions escalate, please do not attempt to address the conflict yourself. Instead, promptly notify the Site Manager, who is trained to manage and defuse such situations effectively. Our Site Managers are equipped to engage with taxpayers, listen to their concerns, and find resolutions in alignment with our organization's policies.

## Cultural Sensitivity and Inclusiveness

At Campaign for Working Families, we are committed to fostering an environment of Diversity, Equity, and Inclusion (DEI) that celebrates and respects the uniqueness of every individual. Our tax sites serve diverse communities representing various cultural, ethnic, and linguistic backgrounds. We believe that treating everyone with equality, respect, and dignity is fundamental to the success of our mission. Volunteers are expected to uphold our DEI policy by embracing the richness of our communities and avoiding any form of discrimination, bias, or stereotyping. This includes providing assistance and communication that is sensitive and culturally aware. By valuing diversity and promoting an inclusive atmosphere, we not only uphold our core values but also ensure that all clients receive the support they need to thrive financially. Your role in championing DEI principles plays a vital part in shaping a positive experience for both taxpayers and fellow volunteers.

## Using Tax Preparation Software

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### TaxSlayer

TaxSlayer is the tax software utilized by all CWF volunteers. Instructions on how to navigate the software are given in our Basic and Advanced trainings. For more information, see [Tab O: Using TaxSlayer Pro Online in the IRS' Publication 4012](#). To test out the software on your own, visit the [TaxSlayer Practice Lab here](#).

### Common Tax Scenarios and Examples

The [IRS Publication 6744](#) has common scenarios you can use to practice and prepare for the Basic and Advanced Certification Exams on Link&Learn. The Link&Learn site has additional tax scenarios ranging from basic returns to more complex situations that require advanced certification. You can find these practice scenarios here in the [VITA TaxSlayer Practice Lab](#). Use the password: **TRAINPROWEB** to access the Practice Lab. After creating an account and logging in, there will be many resources available on the homepage. Under **Section 6: Enhancements and Miscellaneous**, you will find seven different Practice Returns.

## Troubleshooting common TaxSlayer issues

A CWF employee will issue you a unique login on your first day of volunteering. If you miss orientation, please remember to request your login. It's essential to keep your login credentials secure. Login creation requires multi-factor authentication, so you will want to have your cell phone handy while using the software.

To ensure compatibility and minimize potential problems, please use Google Chrome as your web browser when working with TaxSlayer. If you pause for too long while using TaxSlayer, the system may log you out and ask you to login again. If you encounter any issues with logging in or using TaxSlayer, don't hesitate to reach out to your Site Manager or our Volunteer and Partnerships Manager, Elizabeth Olson, at [eolson@cwfphilly.org](mailto:eolson@cwfphilly.org) for assistance.

## Tax Law Training Topics

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As a volunteer Intake Specialist and Tax Preparer you will be trained thoroughly on the topics below. However, we've listed some tips if you need additional support or a refresher on certain aspects of tax preparation.

### Filing status and exemptions

To find information about filing status and exemptions when using TaxSlayer to file your tax return, you can typically access resources within the TaxSlayer software itself. Here's how to navigate through TaxSlayer for this information:

***Navigate to the Appropriate Sections:*** TaxSlayer usually breaks down the filing process into various sections or tabs. Look for sections related to "Filing Status" and "Exemptions." These sections are typically part of the basic taxpayer information you provide when setting up your return.

***Select the "Wizard" and Follow the Prompts:*** TaxSlayer is designed to guide you through each step of the filing process. Follow the on-screen prompts and questions related to your filing status and exemptions. You'll be asked to provide information about your marital status, dependents, and other relevant

***Access Help or Resources:*** If you need further information or have specific questions about filing status or exemptions, TaxSlayer often provides help icons or links that you can click on to access explanations, tips, or IRS publications related to these topics.

### Income, Deductions and Credits

TaxSlayer will ask you questions about different types of **income** the taxpayer may have earned during the tax year. This includes wages, salaries, self-employment income, interest, dividends,

and other sources of income. You'll also be asked about any **deductions** or adjustments to income you may qualify for, such as contributions to retirement accounts, student loan interest, or educator expenses. TaxSlayer will use data you entered about the taxpayer's personal information to determine if the taxpayer is eligible for certain tax **credits** (e.g., Child Tax Credit, Earned Income Tax Credit). TaxSlayer will provide prompts and questions to help you report this information accurately and ensure that your taxpayer receives the best refund possible.

## Tax calculations and Special Tax Situations

TaxSlayer is a fantastic tool because it performs all the calculations for you. All you need to do is input the correct information for each box. Make sure to doublecheck your entries for typos.

TaxSlayer is also designed to ask important personal and demographic questions about each unique taxpayer. This helps determine if the taxpayer has a unique tax situation that requires additional information.

If you have any doubts about a tax return, please don't hesitate to ask your Site Manager for help. They are experienced professionals who have seen all types of different tax situations. Additionally, the IRS website ([irs.gov](http://irs.gov)) offers detailed information and publications on filing status and exemptions that can be useful when using TaxSlayer.

## Quality and Accuracy Procedures

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### Importance of Accuracy and Quality

At the heart of the CWF VITA program lies a commitment to precision and excellence in every tax return we prepare. The impact of our service extends far beyond our interactions, as the accuracy of our work directly influences the financial well-being of the individuals and families we assist. Each taxpayer entrusts us with their financial information, and it is our collective responsibility to ensure that their returns are prepared meticulously, adhering to IRS guidelines and program standards.

By law, tax return preparers must exercise **due diligence** in preparing or assisting in the preparation of tax returns. IRS-SPEC defines due diligence as the *degree of care and caution reasonably expected from, and ordinarily exercised by, a volunteer in the VITA/TCE program*.

This means, as a volunteer, you must do your part when preparing or quality reviewing a tax return to ensure the information on the return is correct and complete. Doing your part includes confirming a taxpayer's (and spouse, if married filing jointly) identity and providing top-quality service by helping them understand and meet their tax responsibilities.

## Common Mistakes to Avoid

- **Inaccurate Social Security Numbers:** When beginning a return in TaxSlayer, the first piece of information you need is the social security number. You must verify the taxpayer's social by comparing it to the copy of their social security card or letter from the Social Security Administration.
  - *Make sure you enter the correct social security number for the Tax Filer. This is an easy mistake to make because there may be several copies of social security cards in your file that belong to a spouse or dependent.*
- **Misspelled Names:** The names of all taxpayers and dependents listed on the return should match the names on their Social Security cards. Using a different spelling of a name or a nickname could result in a rejected return.
- **Incorrect Filing Status:** Some taxpayers choose the wrong filing status and claim people as dependents who may be ineligible. Make sure to ask for clarification if you have a doubt about someone's filing status or dependents. [Publication 501](#) has detailed information about filing statuses.
- **Incorrect bank account numbers:** Taxpayers who are due a refund should choose direct deposit. This is the fastest way for them to get their money. However, taxpayers need to make sure they use the correct routing and account numbers on their tax return. If the taxpayer writes the account and routing numbers on the Intake sheet, when quality reviewing the return with them, make sure they verify that their banking info is entered correctly. If a refund is issued to the incorrect bank account, there is nothing CWF can do to retrieve the funds.
- **Unsigned forms:** An unsigned tax return isn't valid. In most cases, both spouses must sign a joint return. Exceptions may apply for [members of the armed forces](#) or other taxpayers who have a valid [power of attorney](#). Make sure the taxpayer signs the printed return before e-filing.
- **Preparing Returns under the Wrong Year:** Before beginning a return in TaxSlayer, verify that your file is being prepared under the correct tax year. Many of our taxpayers submit files for previous years, which may be mixed in with files from the current tax year. Filing under the wrong year will force you to deactivate the return and start over again under the correct year.
- **Misfiled Returns:** When you finish entering a tax return into TaxSlayer, make sure to put the correct file where it will be in the queue for Quality Review. Misplaced files can cause long delays in issuing refunds.

## Quality Reviewing Returns

Ensuring the accuracy and integrity of every tax return is a top priority. While we encourage all volunteers to practice due diligence and double-check their work, there's no need to be overly anxious. Each tax return you prepare will undergo a final review by a certified Quality Reviewer. This could be a Site Manager, Assistant Site Manager, or an experienced volunteer who has received specialized training in quality review. This meticulous review process is a significant reason why the VITA program boasts such a low rate of rejected returns. It underscores our commitment to providing taxpayers with high-quality, error-free assistance, offering peace of mind to both volunteers and those we serve.

If you happen to make a mistake on a return, the Quality Reviewer will let you know and explain the mistake to prevent it from happening again. Please don't be discouraged, because this is a learning process and everyone makes mistakes. If you still have questions about using TaxSlayer or general tax law, please don't hesitate to ask the seasonal staff or experienced volunteers questions. Our seasonal staff and volunteers are very kind and patient and want you to succeed in your role.

## Ethical Guidelines and Taxpayer Privacy

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### Overview of the Volunteer Standards of Conduct

The Volunteer Standards of Conduct outline the expected behavior and ethical guidelines for all volunteers. These standards are designed to ensure professionalism, confidentiality, and the highest level of service to taxpayers. During your training, we will provide a detailed review of these standards, helping you understand and adhere to them throughout your volunteer experience. These guidelines are fundamental to maintaining our reputation for excellence and trustworthiness in providing free tax assistance to the community.

### Ethics and Integrity in Tax Preparation

Due to the nature of the work you will be doing as a VITA volunteer, you will be asked to complete the IRS's 2023 Volunteer Standards of Conduct Ethics training and exam. This training reviews strict protocols to ensure taxpayer privacy and confidentiality, as well as VITA as a program continues to enjoy the public trust.

To maintain the integrity of our mission and comply with the IRS Standards of Conduct, volunteers may not use the CWF or VITA names, logos, and resources to promote personal businesses or financial interests. Additionally, attendance at free CWF-sponsored VITA trainings is reserved for active volunteers participating in the VITA program.

## Financial Education and Outreach

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### Promoting financial literacy among taxpayers

If you have a background in tax law or professional tax experience, there may be opportunities for you to counsel individual taxpayers about how they can avoid tax liability in the upcoming tax year. Many of our taxpayers have little knowledge on these tax topics and are anxious and intimidated by the tax process. They are very appreciative of any support or advice our volunteers can offer.

### Introducing taxpayers to savings and financial planning resources.

During the intake process, we ask the taxpayers important demographic information and inquire if they are interested in learning more about savings and financial planning resources offered by some of our partners. If they indicate that they are interested in learning more, our Family Stability Department will contact them to set up a phone call or meeting to discuss some of these resources. If you would like to volunteer with the Family Stability department to help make calls, set up appointments and/or provide financial coaching, please contact Cheryl Mackey, Director of Family Stability ([cmackey@cwfphilly.org](mailto:cmackey@cwfphilly.org)).

### Building relationships and trust with taxpayers for long-term financial success

We are committed to fostering meaningful relationships with taxpayers that go beyond the tax season. Our goal is to build trust and provide the support needed for long-term financial success. Through respectful and empathetic interactions, we empower taxpayers with the knowledge and tools to make informed financial decisions. By nurturing these relationships, we contribute to a more financially secure and resilient community, embodying our mission to create lasting positive change in the lives of those we serve.

## Volunteer Support and Resources

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### Continuing Education Opportunities

Each tax season, volunteers with certain professional status can earn **Continuing Education Credits (CE credits)** by completing the required tax law certifications and serving as an IRS-certified volunteer tax preparer with the VITA program. The following professionals are eligible for CE credits: Enrolled Agents (EAs), Certified Financial Planners (CFPs), Attorneys, Certified Public Accountants (CPAs), and non-credentialed tax return preparers participating in the IRS Annual Filing Season Program (AFSP).

To qualify to receive CE credits, volunteers must complete the Volunteer Standards of Conduct and Intake/Interview & Quality Review exams, as well as certify to at least the Advanced level. Volunteers must then serve a minimum of 10 hours as a VITA tax preparer in exchange for 14 hours of CE credits. An additional 4 hours of CE credits can be earned by certifying in a specialty course (Miliary, International, Puerto Rico, or Foreign Student). Volunteers can earn a maximum of 18 CE credit hours. Once tax season has concluded, the manager submits a signed 13615 for each interested volunteer to the SPEC partner, including their professional designation, licensing jurisdiction, bar/license/registration/enrollment number, issue/expiration date, and PTIN (if needed). CE Credits will then be posted to the volunteer's Link&Learn account in early June. See [IRS Fact Sheet: CE Credits for SPEC VITA/TCE Partners and Volunteers](#) for full program details.

## Access to Experienced Tax Professionals

All CWF VITA training is facilitated by experienced tax professionals, which means volunteers can ask the experts questions on tax law and using the TaxSlayer software. All CWF VITA sites are also managed by experienced tax professionals, so every day that you volunteer, there will be a manager or assistant manager onsite that can answer your specific questions. Even virtual volunteers have direct access to an experienced Site Manager via Slack and Zoom.

## Opportunities to grow and take on leadership roles within the VITA program.

We take immense pride in fostering a culture of growth and development among our dedicated volunteers. Many individuals who initially contribute their time and skills as volunteers find their journey with us evolving into impactful roles. Some of these dedicated volunteers transition to becoming seasonal Intake Specialists or Site Managers, harnessing their experience and knowledge to contribute to the smooth operation of our programs. Remarkably, in certain instances, these former volunteers progress to becoming full-time permanent staff members, embodying the spirit of commitment and dedication that defines our organization. This organic progression underscores the potential for personal and professional growth that CWF offers, creating a community of individuals who are deeply invested in our mission and the positive impact we create.

## Celebrating Success and Giving Back

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### Recognizing Volunteer Contributions.

As volunteers at CWF VITA, your commitment and dedication are the driving force behind the success of our program. We deeply value your contributions and to express our gratitude, we've created exciting opportunities for you to win prizes throughout the tax season. Our various raffles and competitions are designed to recognize your hard work and the positive impact you make in the community.

**Early Training Competition:** The first 20 volunteers pass the *Advanced* certification exam(s), and submit a signed Volunteer Agreement will be entered into a raffle to win a \$100 Amazon gift card.

**Super Volunteer Competition:** The first 20 volunteers who complete 50 hours of service will be entered into a raffle to win a \$100 Amazon gift card.

Additionally, our dedication extends to honoring the volunteers with the most hours at our end-of-the-season Volunteer Appreciation Event.

Every month of the tax season three volunteers are selected, through Site Manager nominations, as *Volunteers of the Month*. These stellar volunteers will be featured in our biweekly Volunteer Newsletter and receive a gift from the CWF team.

Your commitment and passion truly shape the heart of our program, and we look forward to celebrating your efforts in various ways as we work together to provide vital assistance to our community.

### CWF Recognition Events

The Volunteer Department hosts an annual “**Volunteer & Staff Appreciation**” event; this takes place at the conclusion of tax season. Volunteers and staff gather to reflect on this season’s accomplishments and enjoy each other’s company in a fun environment. Awards and special recognition are given at this event to milestone volunteers, volunteers with 100+ hours served, outstanding intern, and more.

### Exploring other ways to get involved with CWF.

While the April 15th tax deadline signals the end of the tax season, your journey as a CWF VITA volunteer can extend beyond this point. Select sites will remain open beyond the deadline, (consult the [cwfphilly.org](http://cwfphilly.org) website for the updated, post-season schedule). Virtual volunteers have the unique opportunity to continue serving well beyond the tax season.

Beyond tax preparation there are opportunities to support our Family Stability department by answering phone calls from community members seeking unemployment benefits and other essential public services. For more details on these ongoing engagement opportunities, please feel free to reach out to Syreeta Stanley, Family Stability Manager ([sstanley@cwfphilly.org](mailto:sstanley@cwfphilly.org)).

Your commitment is a testament to the enduring impact of our volunteer community, and we encourage you to explore these avenues of continued service and support.

## Important Contacts for Volunteers

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Diana Allinger, Director, Volunteer Engagement and Partnerships  
[Dallinger@cwfphilly.org](mailto:Dallinger@cwfphilly.org)  
215-982-2218

 Elizabeth Olson, Manager, Volunteer Engagement and Partnerships  
[Eolson@cwfphilly.org](mailto:Eolson@cwfphilly.org)  
267-457-2653

Thais Caine, Director, Tax Operations  
[Tcaine@cwfphilly.org](mailto:Tcaine@cwfphilly.org)  
(267)454-6483

Cheryl Mackey, Director of Family Stability  
[cmackey@cwfphilly.org](mailto:cmackey@cwfphilly.org)