



MANY HAPPY RETURNS

Free File Toolkit

for Community Based Organizations

TAX YEAR 2018

A project by:



**Computer & Communications
Industry Association**

Tech Advocacy Since 1972

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Toolkit Overview

What is the Free File program?

The Free File program is a partnership between the IRS and brand-name tax software companies that provides reputable tax software products to more than 70 percent of all U.S. taxpayers (anyone who made \$66,000 or less in 2018) to prepare and file their federal tax returns online—completely free of charge! Software products made available through Free File walk the user through an easy-to-understand, interview-like process, cutting down on errors and helping filers get the entire refund they're owed. Importantly, Free File also empowers people to better understand their taxes and take control of their financial life. 22 states and the District of Columbia also have state Free File programs, allowing eligible taxpayers to file both their federal and state tax returns for free.

Why use this toolkit?

This document serves as a resource to help organizations like yours promote the benefits of Free File while spreading the word about all of the other services you offer and the work that you're already doing to improve the lives of consumers throughout your community. The Free File Toolkit provides all the tools and resources you may need to deliver important tax preparation and financial education information to your community while raising awareness about the great work your organization does every day.

What's new for Tax Year 2018?

This tax season, we've expanded our editorial calendar offerings to include additional inflection points that you can leverage to communicate the benefits of Free File. We've also included even more social media graphics and sample content to be used throughout tax season. When you're posting social content, don't forget to include events your organization may be holding or important days in your community. We hope that these resources will help you further spread the word about your organization and the Free File program!

What is the goal?

This toolkit was designed to empower our partner organizations to:

- Understand Free File and its benefits to your clients, your community and your organization.
- Help members of your community understand the Free File program and how they can use it to better their financial lives.
- Explore the options for adding Free File to your suite of services and offerings, if applicable.
- Promote the availability of Free File and your other tax prep services to your community quickly and easily, no matter your desired level of engagement or available resources.
- Help as many qualified tax filers as possible complete their returns and receive their maximum refund by adding Free File to their offered services.
- Earn goodwill and recognition for your organization among its beneficiaries (i.e. eligible taxpayers), community leaders, the media and other members of your community.
- Ensure that taxpayers are able to use the Free File program for years to come.

As a community organization, you play a critical role in the empowerment of those you serve. By sharing the benefits of Free File, free IRS-sponsored tax preparation services and financial literacy with your community, you are helping people take control of their financial lives and, ultimately, their futures. We hope as many eligible people as possible use Free File and that other community leaders learn about all of the incredible services you provide. Let's get started!

Where Do I Start?

(Don't worry—we know your time and resources are limited!)

In the pages below you will find a number of tools to help guide your outreach efforts. We know how busy you all are, so these tools are designed to be put into action quickly and easily. Use one or a combination of them to better assist those in need in your community!

Templates of each of the documents in this toolkit are available at:

<http://taxtimeallies.org>

Quick Ways to Spread the Word NOW

1. Post and tweet about Free File to your organization's followers.

Use our custom graphics and editorial calendar (available in the appendix) to spread the word about Free File. You can also ask other organizations in your area to share your content.

2. Include a blurb about Free File on your website or newsletter.

Feel free to copy and paste or tweak our included materials to fit your needs.

3. Fold information about free tax preparation services into your existing materials where it fits.

It's helpful to think about Free File and other IRS-sponsored free tax preparation resources in the context of overall financial health.

Want to Do More?

3 Extra Ways to Get Others to Promote Your Tax Assistance Offerings

Local media can also be an effective tool for getting your organization and Free File's messaging out to the public. You can:

1. Send a press release out to local media. We've even included a template for you. Done.

2. Place an opinion piece in your local press. Read on for more information on how to do so.

3. Produce a brief public service announcement for TV or radio. Use the guide in this toolkit.

Have your own ideas?

Use the talking points included on pages 12-13 of this toolkit to write your own materials and help spread the word. Email us at info@taxtimeallies.org to let us know what's working so we can share with others!

Where Do I Start?

This toolkit contains a number of tips and materials to help you supplement your services with Free File. Although they can be combined in countless ways, here are a just a few ideas for how you can leverage the materials we have provided to help raise awareness about Free File and your other IRS-sponsored free tax prep services throughout tax season.

Hitting the Ground Running: Tax Season Begins!

It's January, and you're almost ready for tax season to begin. The exact start date of tax season has not yet been set, but you can be the first to know when it is by signing up for email updates under the 'News & Events' section of IRS.gov. Once the date has been set, here are some ways you can be sure that people in your community know about Free File and your organization's services:

- **Social Media Countdown**

Post a series of 'countdown' graphics on social media leading up to tax season with information about the services that your organization will offer during tax season.

Sharing or retweeting these graphics is also a great, easy way for Free File champions in your community to help get the word out, so be sure to let them know when you post and ask them to share.

These graphics will also be posted on the Tax Time Allies social media accounts during tax season, so feel free to share and retweet from your organization's account. (Use the social content calendar in the appendix to get organized now!)

- **Letter to the Editor or Opinion Piece for the Local Newspaper**

Most people know that tax season ends in mid-April, but not many people know when tax season begins. By submitting a letter to the editor, you will let people know both when they can begin filing their taxes and that they can file them at no cost using IRS-sponsored free tax preparation services like Free File, TCE, or community-based VITA programs! You can find a draft opinion piece on page 9 of this toolkit to personalize and submit to your local paper.

- **Email Your List of Clients and Members Announcing the Start of Tax Season**

Many of the people who used Free File at your organization last year may want to do so again. Letting people know that they can start today may remind them of the Free File program and allow them to take advantage of this service rather than miss out for another year. This is also a great way to alert community partners that tax season has begun and that your organization is the place to help those who need it.

Where Do I Start?

In the Thick of It: Raising Awareness During Tax Season

Tax season has begun and you are helping clients file their taxes. It's a busy time for you, which is why it's helpful to schedule social media posts ahead of time and rely on some of your champions to keep the conversation going:

- **Have Community Partners Spread the Word**

Now is the time for the relationships you've built throughout the rest of the year to pay off. Ask your free IRS-sponsored partners to include information about Free File and your IRS-sponsored free tax preparation services in their February or March newsletters, emails or bulletins. If they have notice boards, ask them to put up a flier. Sample talking points and messages to share with community partners are included on pages 12-13 of this toolkit. Outreach tactics, including a sample flier, are included on pages 14-20.

- **Post a shareable "I Filed My Taxes" Graphic and Encourage Clients to Share**

After a client has a positive experience filing their taxes at your organization, encourage them to visit your Facebook or Twitter to share or retweet a graphic that highlights that they filed their taxes for free this year and hopefully saved the difference. This will serve as some of the most reliable and trusted promotion you could ask for, and will help you reach audiences you may not normally be able to access! All corresponding social media graphics referenced in the CBO Toolkit are available at TaxTimeAllies.org on the "Partner Resources" tab.

Want to do more? Hold an event! Not only is it a great way to help more people, it's a great way to get people in your community excited about Free File and tax season. Don't forget to reach out to community calendars to make sure your event is included!

The Final Countdown: Early April Ideas

The final weeks of tax season can be some of the busiest for your organization as people realize that the deadline is coming up. It's also a great time to help promote the Free File program as last-minute filers are working to get their taxes done in time and may turn to other services because they don't know Free File is an option. Here are a few ways that you can remind people of the services you offer as the tax deadline approaches:

- **Post a Countdown to the End of Tax Season on Social Media**

Use the shareable graphics we've included in the editorial calendar and encourage your volunteers and staff, as well as your community partners, to share the posts and make sure that Free File is included in the your community's conversation about Tax Day.

Press Releases

Editable Press Release

Press releases are a great way to publicize your organization's support for the Free File program! They are especially effective when they correspond with an inflection point or event, such as the first day of tax season or an open house at your organization. We have created a template release with placeholder language that can be easily and quickly personalized for your organization. Releases can be emailed to local media, sent through a wire distribution service and posted on your website. This type of outreach is most effective when distributed around tax-related events, such as the IRS's announcement of the Free File start date. Please contact us at info@taxtimeallies.org if you need a list of local media (with email addresses) in your area or have any other questions.

[LOGO]

For Immediate Release

[Organization Name] Encourages Taxpayers to Use IRS-Sponsored Free Tax Prep Services like Free File, VITA, and TCE—Easy, Safe, No-Cost Ways to File Taxes Online or In-Person

Local Community Group Encourages Families to Keep and Save Their Refund

[City, State] - [Month Date], [Year]—[Organization Name] is proud to promote IRS-Sponsored free tax-prep services to help ensure lower and moderate-income taxpayers receive their full refund at no cost. These services include Free File, VITA, and TCE.

IRS Free File (www.irs.gov/freefile) offers brand-name tax preparation software free of charge to eligible taxpayers in our community who earned \$66,000 or less last year prepare and securely file their federal (and in many cases, their state) tax return online for free. Free File helps taxpayers save hundreds of dollars on tax preparation fees, which can be used to help jumpstart savings and empower those seeking financial independence. Since the program started in 2003, over 53 million Americans have used Free File to save nearly \$1.46 billion in tax prep fees. Twenty-three states have formed similar partnerships with the Free File Alliance, enabling eligible taxpayers to file both their federal and state returns for free.

(continued on next page)

Press Releases

<<<For non-VITA Community Based Organizations>>>

[Organization Name] has been operating in [City or Region] for [Years of Operation] and is dedicated to [insert a short description of what the organization does]. Helping the community during tax time is an important part of [reiterate why helping people file their taxes for free is important to your organization's mission].

<<<End Paragraph>>>

OR

<<<For Volunteer Income Tax Assistance Programs>>>

Our organization is one of over 12,000 Volunteer Income Tax Assistance (VITA) programs across the country on which the IRS relies to help people file their taxes every year. In 2018 alone, our IRS-certified volunteers helped over [Insert XX,XXX number of individuals helped if available or "thousands of"] individuals in [City or Region] qualify for and keep 100% of their refunds—totalling over \$[Total Refunds in 2018 for All Customers]—without worrying about hidden fees or unexpected charges.

<<<End Paragraph>>>

"Tax time can be one of the most important money moments of the year for low and moderate-income families," said [Name of Organization Representative], [Title and Organization].

[Organization Name] wants to do all that we can to help people maximize their refund during the Tax Time Moment. "Taking advantage of free IRS-sponsored tax prep services such as Free File, VITA, and Tax Counseling for the Elderly (TCE) is the perfect first step for consumers hoping to improve their financial health," [Name of Organization Representative] continued.

For more information about Free File and other IRS-sponsored free tax preparation services available through [Organization], please visit www.irs.gov/freefile or [link to organization website].

###

About [Organization Name]:
[Organization Boilerplate]

About Tax Time Allies: [if organization identifies as Tax Time Ally in release]

What is Tax Time Allies?

The Tax Time Allies program is designed to bring together community leaders, community groups, private companies, and local VITA programs to help inform their communities about the free IRS-sponsored tax preparation resources available to qualifying taxpayers, and to show them how these resources can help them save more and improve their overall financial health and well-being. To learn more, visit www.TaxTimeAllies.org.

Media Contact:

[Media Contact Information]

Op-Eds

Most newspapers feature an op-ed (opinion editorial) section, through which readers and public figures can express viewpoints and/or respond to particular news events. Each newspaper has its own length requirement, but they tend to be between 600 and 700 words long. With these longer word requirements, op-eds provide you with the perfect opportunity to describe your point of view in more detail and share all relevant information about Free File and your organization. These submissions can be authored by your organization's director, a Free File volunteer or community leaders. The template below can serve as a guide as you consider writing your own op-ed.

Free File Helps Americans Take Advantage of the Tax Time Moment

By **[Name, Title, Organization]**

For many Americans, tax season is a time of stress, frustration and confusion. The stakes are high and the pressure is on. However, tax time also presents one of the biggest opportunities for Americans across the country and across the economic spectrum to improve their financial lives for the coming year.

Tax refunds are predictable, timely and, for many filers, the biggest paycheck they see all year. In fact, for low- to moderate-income filers, a tax refund can make up over 30 percent of a family's annual income. Receiving that much money is exciting and creates the ideal opportunity to save and plan for a better financial future. We call this opportunity the Tax Time Moment.

[Name of Organization] has been proud to assist our community for over **[XX]** years in helping people keep more of their hard-earned money, maximize the tax time moment and take control of their financial health. **[Specific Information About Other Tax Prep Programs You May Offer]**. We have seen first-hand the difference that tax time savings can make in the lives of people across our community, which is why we feel so strongly that everyone deserves the chance to make the most of their tax refund.

But in order to get the full refund that they are owed and maximize this critical opportunity, filers have to ensure that their taxes are filed securely, correctly and on-time. Which begs the question: how can filers get their taxes done right, and for as little cost as possible? For over 70 percent of Americans, the answer is clear: the IRS Free File program.

The IRS Free File program is a partnership between the IRS and some of the nation's most trusted tax software companies to provide free federal tax return preparation assistance to Americans across the country at no cost. Companies donate their products for this purpose, and

they are approved by the IRS, ensuring that the process is safe and secure.

Free File encourages its users to e-file their taxes, which is the fastest and most secure way to acquire your refund. And since it's online, taxpayers can use Free File anywhere they have access to the Internet: from a public library or a community center to the comfort of their home.

This program is nothing new. Since its founding in 2003, Free File has saved Americans over \$1.3 billion in tax preparation costs, and has made all the difference for some families. What's been even more impactful is that over 40 million Americans have been able to secure the entire refund that they were owed, which has empowered them to better understand their finances and to make a new, financially healthy start for the coming years.

And it turns out that the vast majority of us, over 100 million Americans, are eligible for the program. Anyone who made \$66,000 or less last year is able to use at least one of these industry-leading tax preparation software programs, free of charge. Taxpayers living in **[State, if Applicable]** can also file their state taxes at no cost through the program.

For those seeking in-person help and making \$54,000 or less, local Volunteer Income Tax Assistance (VITA) programs are available and staffed with IRS-certified volunteers who can help prepare accurate returns safely, securely and free of charge.

Tax time can and should be a moment of excitement and opportunity, not stress and confusion. Every American deserves financial freedom, and we have seen, time and again, that a successful tax time moment, achieved through Free File, is one of the simplest ways to get there.

[Insert Author Name, Title, and Organization]

Public Service Announcements

A public service announcement (PSA) is an effective and low-cost way to reach key audiences and spread the message about free IRS-sponsored tax prep programs like Free File, VITA, and TCE so that taxpayers can maximize their refunds and save as a part of their Tax Time Moment. In fact, many broadcast outlets, both television and radio, donate studio and airtime for PSAs! A PSA should be no longer than 30 seconds, so make your message as succinct as possible. Below, we have provided instructions on how to develop a PSA along with a template script for an announcement about the Free File program.

How to Produce a PSA:

- 1 Identify the speaker for your PSA. Ideally, it should be a director or executive from your organization who is comfortable speaking on camera or radio.
- 2 To record the video, you have two options:
 - Work with a local television or radio station to produce it. Often, stations will provide studio time as a public service and then air the video or audio themselves
 - *Contact a producer at a local television or radio station and explain your organization's mission and the purpose of the PSA. You can reach the right contact by calling the station's main line and asking to speak to their public affairs manager. We can help provide contact information if you need it—just email info@taxtimeallies.org and let us know which station you want to contact.*
 - *Discuss with the station whether the PSA can be distributed to other stations as well.*
 - Hire a videographer to film or record the PSA. Ensure that the videographer can record broadcast-quality video and audio.
 - *After recording the video or audio, contact producers at local television or radio studios.*
 - *Keep the video simple. A person sitting in front of a logo or plain background is sufficient.*
- 3 Once the video or audio is recorded, contact local television or radio producers and explain to them what your organization does and the issue at hand to see if they will donate airtime. Here's a sample email to get you started:

Hi [Name],

My name is [Name], and I would like to submit a PSA on behalf of [Organization]. We provide free IRS-sponsored tax preparation services (Free File, VITA, TCE) in the [Community/State] area which allows people making under \$66,000 to prepare their taxes at no cost, saving taxpayers hundreds of dollars. These programs assist both those who want to file on their own, as well as those who may require extra assistance.

Would you be willing to donate airtime to run this PSA?

Public Service Announcements

- 4 The PSA can either be distributed by CD, DVD, or flash drive, or by using a file-sharing service such as DropBox.

Sample Script

30-Second Public Service Announcement – “Prepare and File Your Tax Return at No Cost”

Hi, I’m [Name] from [Organization] with important news about filing your taxes.

If you or someone you know made \$66,000 or less last year, you may be eligible for IRS-sponsored free tax assistance programs such as Free File, VITA, and TCE.

Free File provides no-cost online tax preparation software from some of the most trusted tax prep companies through a partnership with the IRS. These products are IRS-approved, free, safe, and secure and allow taxpayers to file wherever they have internet access.

Or, if you’d like free additional assistance in person, we at [Organization] are here to help you save this tax season. We’ve helped [Insert XX number of individuals helped if available or “thousands of”] people in our community for over [XX] years take control of their financial lives and maximize their refunds during Tax Time and beyond. Before you file your taxes this year, visit www.irs.gov/freefile [Or Organization’s Website] to see if you’re eligible.

Use Free File to e-file. Consumers who make up to \$66,000 per year qualify for the Free File program, which allows the use of free, name-brand tax filing software from some of the biggest names in the tax prep business. Over 70 percent of all American taxpayers—upwards of 100 million individuals—are eligible to use brand-name tax preparation software to file their Federal (and in many cases, state) taxes completely free of charge.

Take advantage of in-person tax preparation assistance. For those who generally make \$54,000 or less, you may qualify for free tax help. Skip the high-cost tax preparation outfits and instead take advantage of free tax preparation assistance from the Volunteer Income Tax Assistance (VITA) programs in your community. VITA programs are staffed by IRS-certified volunteers who can help individuals prepare accurate returns safely, securely, and free of charge.

Take advantage of free tax preparation services to maximize your *Tax Time Moment*. Using these free IRS-sponsored services to complete a tax return and take advantage of credits and deductions empowers taxpayers to take control of their personal finances year-round.

Talking Points

How to Talk about the Free File Program

To encourage taxpayers to take advantage of IRS-sponsored free tax preparation services (such as Free File, VITA, and TCE), it is helpful to have a set of basic messages to guide conversations and address important aspects of the programs. These talking points provide insight into how to describe each of the programs and their benefits and can be used as a basis for outreach, promotional materials, and more. We also encourage you to include stories about how IRS-sponsored free services have helped taxpayers specifically in your community.

What is Free File?

Through the Free File program, over 70 percent of all American taxpayers—upwards of 100 million individuals—are eligible to use brand-name tax preparation software to file their Federal (and in many cases, state) taxes completely free of charge. Millions of Americans have already used Free File and trust this service to help them get their taxes right.

- If you earned \$66,000 or less last year, you qualify to use at least one of 12 brand-name IRS-sponsored free tax preparation software products.
- This could save you hundreds of dollars on tax preparation fees, which can be put towards things that benefit you, like setting aside some of your refund in savings, paying bills, or making new purchases.
- The program allows you to e-file your taxes for speed, safety and reliability.
- You can have your refund deposited directly into your account and can track it electronically.



Can Free File Help with State Taxes?

22 states and the District of Columbia have similar partnerships to offer Free File at the state level, meaning eligible taxpayers can file both their federal and state returns at no cost using secure, industry-leading software products.

Talking Points

Why is Using Free File Important?

The IRS relies on Free File to help millions of individuals and families file their Federal taxes each year, free of charge. The program helps taxpayers save hundreds of dollars on tax preparation fees, which can be used to help jumpstart savings and empower those seeking financial independence.

- Many low-to-moderate-income families receive over 30 percent of their annual income in tax refunds, making the accurate preparation of their tax returns especially consequential.
- More than 53 million Americans have taken advantage of the Free File program since it started in 2003.
- Through this program alone, Americans have saved \$1.6 billion in tax preparation fees.
- If you are eligible for Free File, you may also qualify for the Earned Income Tax Credit (EITC). The Free File software will help you determine if you are eligible and the amount of your tax credit.
- Active-duty military personnel, including National Guard and Reserves, with an AGI of \$66,000 or less, can also use Free File.
- For more information about Free File, visit www.irs.gov/freefile.

What is VITA? What is TCE?

If a taxpayer does not have computer access or needs additional support, they can get in-person help from local IRS-certified volunteers. They can visit one of the 12,000 IRS-certified Volunteer Income Tax Assistance (VITA) sites across the country to maximize their refund and claim all the credits that they deserve. In addition, the Tax Counseling for the Elderly (TCE) program offers free in-person tax help to individuals who are age 60 or older.

- The volunteers and staff tax preparers at VITA tax preparation sites go through a minimum of 15 hours of training and are certified by the IRS.
- These sites are generally located in community or neighborhood centers, libraries, schools, shopping malls, and other convenient locations.
- For more information on VITAs and their expert tax preparation services, visit www.irs.gov/vita.

What is Tax Time Allies?

The Tax Time Allies program is designed to bring together community leaders, community groups, private companies, and local VITA programs to help inform their communities about IRS-sponsored free tax preparation resources available to qualifying taxpayers, and to show them how these resources can help them save more and improve their overall financial health and well-being.

Outreach - *Champions*

Recruit More “Free File Champions”

What do we mean by Free File Champion? We mean you! A Free File Champion is any person or organization that works to promote and raise awareness around the Free File program in their community. We want to help you expand your organization’s reach by recruiting more Free File Champions in your area.

A Free File Champion can be any local or neighborhood leaders, from your Mayor or City Council Member to the owner of your favorite coffee shop or the person who runs your local food bank. What makes us all Free File Champions is not who we are, but what we believe. We believe that the Free File program is an important tax preparation tool that allows millions of families each year to better understand their finances and savings goals.

Who can you reach out to?

There is no limit to who can be a Free File Champion. We recommend reaching out to those in your community that you know are interested in helping families meet their financial goals. More specifically, we recommend you consider the following categories of potential Free File Champions:

1. Community leaders

- Mayors
- City Council Members
- School Board members
- State and County officials
- Congressional representatives

2. Leaders of local non-profit organizations

- Food banks
- Charities for women and families
- Religious organizations

3. Business leaders and media

- Small business owners
- Local newspapers, magazines or TV stations
- Local Chambers of commerce

4. Local Institutions

- Libraries
- Universities/Community Colleges
- Kiwanis, Knights of Columbus or Elks clubs

Outreach - *Champions*

What do you say?

We recommend starting conversations with potential Free File Champions by explaining the program, why you support it and why you believe it is important for your community. Your goal is to gain their support, not only for the Free File program at large, but, more importantly, for your work to promote the program and the other services you provide. We recommend considering asking potential partnering champions to:

- Support Free File by sharing this information with and promoting your events to their constituents/customers and on their social media accounts.
- Support Free File by volunteering at one your events, helping others learn how to use the Free File program.
- Support Free File by hosting their own event or setting aside a specific time for you to come share information about the Free File program with them or their clients/constituents.

We have included below a draft email, which can be adapted as needed, to assist you as you begin outreach and recruit more Free File Champions.

Sample Recruitment Email:

Dear **[Name]**,

I am writing to share with you my support for the IRS Free File program and to ask for your help in spreading the word about this important tool for tax preparation, which has helped millions of families save their hard earned money and jumpstart their journey towards financial stability.

The Free File program is a public-private partnership between the IRS and the Free File Alliance, a coalition of industry-leading tax software companies. Since its inception in 2003, Free File has saved more than 50 million Americans over \$1.3 billion in tax preparation costs. This program provides brand-name tax software products at no cost so that those who qualify can quickly, easily and securely do their taxes anywhere they have access to the Internet.

(continued on next page)

Outreach - *Champions*

(Sample recruitment email continued from previous page)

Anyone who made \$66,000 or less last year is eligible for free tax software products through the IRS Free File program, meaning that more than 70 percent of Americans are able to prepare their federal taxes at no cost. Many states also offer Free File programs.

The software available through Free File can help members of our community save hundreds of dollars in tax preparation fees by walking users through an interview-like process, ensuring that they receive the maximum refund they are owed.

For low- to moderate-income filers, that refund can be the biggest paycheck they see all year. In fact, for some families, tax refunds can make up over 30 percent of their annual income. Receiving that much money creates the ideal opportunity to save and plan for a better financial future. We call this opportunity the Tax Time Moment.

At **[Organization]**, we have seen first-hand the difference tax time savings can make in the lives of people across our community, which is why we believe so strongly in Free File and the immense tax preparation help it provides.

For those seeking in-person help, local Volunteer Income Tax Assistance (VITA) programs are staffed with IRS-certified volunteers who can help individuals prepare accurate returns safely, securely and free of charge.

[Optional: include personal note about why your organization supports Free File and your experiences with the difference it has made in people's lives.]

We believe that **[you/your organization]** could be a great asset in informing our community about these resources. **[Include note on how the Free File program could help those that the third-party group works with (constituents, clients, etc.).]**

Would you be interested in talking with me further about this program to find ways we could work together to promote it? You can start helping right away by sharing more information about Free File and VITA programs on your social media platforms and website.

Thank you for your time, and please do not hesitate to reach out with any questions.

Sincerely,
[Outreach Coordinator / Executive Director]

Outreach - *Recruitment*

Recruit More Volunteers

We understand that recruiting volunteers is an important part of making your tax season successful. In order to help you recruit more volunteers as easily as possible, we have put together the following ideas. We have also included a draft email and flier, both of which can be adapted as needed.

Types of volunteer roles for Free File promotion:

- Outreach and promotion help (can be pounding the pavement or virtual volunteering)
- Greeter
- Story Reporters (gathering great stories from taxpayers and volunteers to show how the program works and encourage others to use it or volunteer)
- Computer Assistants

Where to post recruitment fliers (see next page for example):

- Local education institutions, for example: high schools and community colleges (many have requirements for volunteer hours!)
- Religious organizations, like churches or synagogues
- Non-profits, such as YMCAs or local Elks clubs
- Community spaces, for example: public pools, community arts centers or senior centers
- Neighborhood stores, like coffee shops and grocery stores

Outreach - *Recruitment*

Sample recruitment flier language

HELP FAMILIES MEET THEIR FINANCIAL AND SAVING GOALS

Volunteer with **<insert organization>** and get involved with the Free File Program

What is it?

Free File provides no-cost tax preparation software products to low-and-middle-income Americans through a partnership between the IRS and brand-name tax software companies.

Free File is available to any taxpayer who made \$66,000 or less in 2018. 70 percent of all American taxpayers are eligible for the program.

Why is talking about tax time and Free File important?

Tax preparation allows millions of families each year to better understand their finances and savings goals.

Using Free File can help taxpayers keep more of their hard-earned money.

Using Free File to complete a tax return and take advantage of credits and deductions empowers taxpayers to take control of their personal finances year-round.

How can I help?

You can help families navigate the Free File system and file their taxes at no cost.

<Insert specific ways volunteers can help at your organization>

Contact **XX** at **<insert email address>** or **<insert phone number>** for the next opportunity to volunteer.

Outreach - *Recruitment*

Sample Volunteer Recruitment For a Free File Taxpayer Assistance Event

Dear **[Insert Name]**,

Thank you for your interest in volunteering with **[Organization]**! We are excited to have you as a part of our team.

First, let us tell you a little bit about the IRS-sponsored free tax preparation services and why they are so important.

Free File is a public-private partnership between the IRS and the Free File Alliance, a coalition of industry leading tax software companies. Since its inception in 2003, Free File has saved more than 50 million Americans over \$1.3 billion in tax preparation costs. This program provides brand-name tax software products at no cost so you can quickly, easily and securely do your own taxes anywhere you have access to the Internet.

Anyone who made \$66,000 or less last year is eligible for free tax software products through IRS Free File, meaning that more than 70 percent of Americans are able to prepare their federal taxes at no cost. Many states also offer Free File programs. For those seeking in person tax preparation help, local Volunteer Income Tax Assistance (VITA) services are also available to those making \$54,000 or less. VITA programs are staffed by IRS-certified volunteers who can help prepare accurate returns safely and securely.

[Optional: include personal note about why your organization supports Free File and your experiences with the difference it has made in people's lives.]

The software available through Free File can help members of our community avoid hundreds of dollars in tax preparation fees by empowering users to do it on their own through an easy to understand interview-like process, ensuring that they receive the maximum refund they are owed.

For low- to moderate-income filers, that refund can be the biggest paycheck they see all year. In fact, for some families, tax refunds can make up over 30 percent of their annual income. Receiving that much money creates the ideal opportunity to save and plan for a better financial future. We call this opportunity the Tax Time Moment.

At **[Organization]**, we have seen first-hand the difference that tax time savings can make in the lives of people across our community, which is why we believe so strongly in Free File and the immense tax preparation help it provides.

But how can you help? Well, it so happens that our organization is planning an event to raise awareness around the Free File programs.

[Insert event details or any of your plans to promote Free File this tax season.]

Would you be available to help with this event?

If not, there are several other volunteer opportunities available within the organization. **[Insert description of other organizational activities.]**

Thank you in advance. We look forward to working with you!

Sincerely,
[Volunteer Coordinator / Executive Director]

Outreach - *Training Tips*

Volunteer Training Tips

A good volunteer is a well-informed volunteer, so it's important that your volunteers understand how vital Free File and other tax preparation services are to your community! The same information and messages that you use to help convince your clients to take advantage of your free preparation services can be used to teach your volunteers how to navigate and feel comfortable with these services. Be sure to give them enough information to explain Free File clearly:

- Did you make \$66,000 or less in 2018? If so, you're eligible to file your taxes with Free File!
 - **<IF STATE OFFERS FREE FILE AT STATE LEVEL>** In fact, you can file both your federal and state returns at no cost this year!
- By using Free File, you can keep as much of your hard-earned refund as possible by capturing all the credits and deductions for which you are eligible.
- Since 2003, taxpayers across the country have saved over \$1.3 billion in tax preparation fees by using Free File instead—and you could be one of them!
- Free File provides tax preparation software from companies that you recognize and trust. All Free File products are IRS-approved, keeping your information safe and secure.
- Easy electronic tax filing through Free File means fewer errors and a faster refund for you!
- Do you have a computer and Internet access, either at home or at a community location? Then you can do your taxes with Free File!
- If you need extra help, don't worry! That's what we're here for. You can come to **<ORGANIZATION'S VITA SITE>** to speak with an IRS-certified tax expert about your tax return.
- Did you know that you might also qualify for the Earned Income Tax Credit (EITC) and up to \$6,200 back in your pocket? Free File will do the work for you and make sure that, if you are eligible, you get the refund that you're entitled to!

Tax time can be intimidating. That's why your volunteers should have all the information they need to be warm, welcoming and reassuring while explaining why filing taxes is easier than people think!

VITA Case Studies

Website Optimization

CASH Oregon – Portland, Oregon

Ahead of last tax season, CASH Oregon planned to revamp their website to make it mobile-friendly and easy to navigate, allowing more people than ever before to access their information about the Free File program and other tax preparation services offered at its sites across Oregon on-the-go.

Now, when people visit the CASH Oregon website, they are greeted with clear, large links to both CASH Oregon's services and information about Free File, including a link to the Free File site and a video explaining the program. In addition, they even provide a link for people to sign up to volunteer!

The optimization was a giant success. Nearly 66,000 people visited CASH Oregon's newly-optimized website during tax season, up 82% from TY '14. In addition, nearly 4,700 people clicked CASH Oregon's "File Online" link to file their taxes through Free File.

Recruiting Free File Champions

Accounting Aid Society – Detroit, Michigan

Accounting Aid Society partners with schools and employers in their area to help raise awareness about tax preparation services, including Free File, VITA and TCE. They have built relationships with social services organizations in their community, as well as with schools such as the University of Michigan-Dearborn, Baker College and Henry Ford College. They also continue to build their relationship with employers of lower income workers in their area, providing them with information that could help their employees file their taxes at no cost. In addition, Accounting Aid Society established a new partnership with the City of Detroit Mayor's office to promote their tax preparation services.

In the future, they hope to connect with additional youth employment programs to raise awareness of Free File among a population that is largely eligible for the program but may not know of its existence. Accounting Aid Society also hopes to build upon their existing partnerships to make them better than ever in TY '18!

VITA Case Studies

Raising Awareness Online and Off

Food Bank For New York City – New York, New York

Food Bank For New York City (FBNYC) has several tax preparation sites across the five boroughs of New York City. FBNYC has developed a comprehensive strategy to ensure that people can easily learn more about the sites closest to them, using a mix of community partners, outreach and online engagement.

They worked to increase awareness of their services by optimizing their website for search engines, ensuring that any one search engine optimization (SEO) maximizes the number of visitors to a website by making sure it ranks high on the list of results that search engines (such as Google) return. Two great ways to do that are to regularly post content and use keywords that are relevant to your organization and Free File on articles and in headlines. By optimizing their site accordingly, Food Bank For New York City ensured that anyone looking for tax services would be able to find their website and learn more about free tax preparation sites and the Free File program. Food Bank also made sure to regularly post tax-specific information on its social media platforms, increasing awareness that Food Bank sites also offer tax services.

In addition, Food Bank For New York City made sure to highlight specific sites and community partners when speaking to local media outlets, changing the information they provided based on where the outlet was located. They also were able to set up a call-in center where people received basic tax preparation information and learned where they could find their nearest Food Bank site. Next season, they plan to build on a partnership with New York Public Libraries to expand their Free File services into even more neighborhoods.

Connect with libraries in your community to expand your network and promote your services!

Turning Emails into Returns

Rappahannock United Way – Fredericksburg, Virginia

Rappahannock United Way worked with three local businesses in TY '15 to distribute emails about their tax preparation assistance and the Free File program. Mary Washington Health Care, GEICO and Spotsylvania Regional Medical Center all helped distribute emails, which included a link to the Rappahannock United Way website, to provide people with additional information about income brackets, and to help them pick the best tax preparation option for their circumstances.

As a result of these email blast partnerships, more than half of the returns prepared by Rappahannock United Way were prepared using IRS-sponsored free tax preparation services like Free File, VITA and TCE. Next season, Rappahannock United Way hopes to expand their email blast efforts, providing information about the Free File program to even more people in their community.

Resources - Eligibility

Which Tax Tool Is Right For You?

We strive to empower taxpayers to better understand their finances and meet their savings goals, and to begin planning for a more stable financial future. That's why we're such strong advocates for the two free tax preparation services that the IRS has made available to the public: the Volunteer Income Tax Assistance (VITA) program and Free File. But how do you know which one is right for you?

Below is a chart to help you determine which free tax prep service meets your needs so you can have the best experience!

Free Tax Preparation Program	Volunteer Income Tax Assistance (VITA)	Free File
Program Description	<p>The Volunteer Income Tax Assistance (VITA) program offers free basic income tax return preparation with electronic filing to people who generally make \$54,000 or less and need assistance in preparing their tax returns.</p> <p>VITA sites offer knowledgeable, IRS-certified tax preparers to assist filers in completing their taxes free of charge. These credentialed volunteers ensure that you quickly receive the full refund you deserve—and there are no tricks or hidden costs.</p>	<p>Free File provides free tax preparation software products to people who make \$66,000 or less through a partnership between the IRS and 12 brand-name tax software companies.</p> <p>Free File is safe, secure and empowering—ideal for eligible taxpayers who are comfortable using a computer and have a simpler return. It walks you through an easy, interview-like process to ensure that you secure the entire refund you're owed.</p> <p>Free File is completely FREE to use. In fact, Free File has saved taxpayers nearly \$1.3 billion in tax prep fees since 2003. And there are no attempts to upsell you into buying additional services or to collect their information for marketing purposes.</p>
Who completes the return?	VITA-Certified volunteers prepares your return, asking you questions and reviewing your records with you, to secure the information necessary to get you the entire refund you're owed.	You do! You are the most knowledgeable about your finances, therefore you're the best person to complete your tax return. Many VITA sites also have computers available where you can file your own taxes with staff on hand to answer questions as they arise.
Where can I find it?	<p>VITA is available at convenient locations throughout the country, including community centers, public libraries, schools and shopping malls.</p> <p>To find a VITA site near you, visit http://irs.treasury.gov/freetaxprep/ or call 800-906-9887.</p>	<p>Free File is accessible through the IRS website (www.irs.gov/freefile), meaning you can complete your taxes from anywhere you can access the internet.</p> <p>Additionally, assistance is available at select VITA sites that offer Facilitated Self-Assistance (FSA).</p>
Which one may be right for me?	<p>I earned \$54,000 or less in 2018 and...</p> <ul style="list-style-type: none"> • I have a more complex return and would prefer for a VITA volunteer to prepare it at no cost to me. • I have trouble reading or writing in English and need a VITA volunteer to prepare my tax return at no cost to me. • I have a disability and could use a VITA volunteer to prepare my tax return at no cost to me. 	<p>I earned \$66,000 or less in 2018 and...</p> <ul style="list-style-type: none"> • I am comfortable using a computer and I want to prepare my return using free tax prep software. • I have successfully prepared my own taxes in the past, but I want to use tax prep software for free this year. • I have used a paid tax preparer in the past, but would like to do it myself now that I can access tax prep software for free.

Resources - *What to Bring*

What To Bring To Get Your Taxes Done Right

What documents should I bring when I visit my local VITA site?	What documents should I have handy when I file my taxes with Free File?
<p>Be sure to have the following handy when you head to your local VITA site:</p> <ul style="list-style-type: none">• Proof of identification (photo ID), Social Security cards for you, your spouse and dependents<ul style="list-style-type: none">• If you, your spouse and your dependents do not have a Social Security number, an Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted• Birth dates for you, your spouse and dependents on the tax return• Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers• Interest and dividend statements from banks (Forms 1099)• All Forms 1095, Health Insurance Statements• Health Insurance Exemption Certificate, if received• A copy of last year's federal and state returns, if available• Proof of bank routing and account numbers for direct deposit, such as a void check• Total paid for daycare provider and the daycare provider's tax identifying number, such as their Social Security number or business Employer Identification Number• Forms 1095-A, B or C, Affordable Health Care Statements• Copies of income transcripts from IRS and state, if applicable	<p>Be sure to have the following handy when you begin the Free File process online:</p> <ul style="list-style-type: none">• Birth dates for you, your spouse and dependents• Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers• Interest and dividend statements from banks (Forms 1099)• All Forms 1095, Health Insurance Statements• Health Insurance Exemption Certificate, if received• A copy of last year's federal and state returns, if available• Your bank routing and account numbers for direct deposit, which can be found on your checks• Total paid for daycare provider and the daycare provider's tax identifying number, such as their Social Security number or business Employer Identification Number• Forms 1095-A, B or C, Affordable Health Care Statements• Copies of income transcripts from IRS and state, if applicable

Resources

General Hardware & Software Needs

TechSoup - www.techsoup.com

TechSoup is a program with a wide variety of services exclusively for non-profit organizations. The most useful utility they offer is their product donation program, which provides crucial, often pricey, software and equipment to non-profits at a free or discounted rate. The available products are donated to the program by industry-leading brands, giving access to high-quality software and equipment that would otherwise be too costly for many organizations. In addition to the product donations, the program also offers ongoing technical support for the products they provide.

Furthermore, their website is frequently updated with free resources and webinars on best practices in digital marketing, social media strategy, etc..

Ideal For:

Partners seeking to do more digital and social media work in-house with limited resources.

Free subscription.

Email Outreach Tools

Email is still one of the most direct and powerful ways to reach your audience. The following tools allow you to create professional-looking emails, distribute them to your contact lists and evaluate the success of your campaigns. These also help segment your lists, allowing specific messages to reach specific audiences.

MailChimp - www.mailchimp.com

MailChimp is the most popular email marketing software used by nonprofits and corporations alike. It is built for users with very limited technical experience and has an intuitive user interface.

Ideal For:

Easiest software to use to start your email marketing outreach. Free use only up to 2,000 recipients.

Features:

- Allows users to easily create professional-quality email campaigns using a drag-and-drop email builder and pre-designed templates
- Provides statistics such as who opened your email, how many users clicked on links within your email, if the email was forwarded on to other people, etc.
- Allows the user to easily build and segment their contact lists with a number of different classifications
- Provides a free sign-up tool that can be used on your website to add users to your email list

Price:

- Up to 2,000 recipients: Free
- Up to 5,000 recipients: \$50.00/month or Pay-As-You-Go campaigns
- Pricing plans increase incrementally by number of recipients

Resources

Email Outreach Tools (cont'd)

Constant Contact - www.constantcontact.com

Constant Contact is an email marketing software program used by non-profits and corporations. It is built for users with very limited technical experience but has a slightly less intuitive user interface than MailChimp.

Ideal For:

Slightly more tech-savvy users.

Features:

- Allows users to easily create professional-quality email campaigns using a drag-and-drop email builder and pre-designed templates
- Provides statistics such as who opened your email, how many users clicked on links within your email, if the email was forwarded on to other people, etc.
- Allows the user to easily build and segment their contact lists with a number of different classifications
- Provides a free sign-up tool that can be used on your website to add users to your email list

Price:

- Up to 500 recipients: \$20.00/month
- Up to 2,000 recipients: \$45.00/month
- Up to 5,000 recipients: \$65.00/month
- Pricing plans increase incrementally by number of recipients

Vertical Response - www.verticalresponse.com

Vertical Response is an email marketing software program used by nonprofits and corporations. Like the other options, it is built for users with very limited technical experience and has a simple interface that allows the user to schedule emails and organize email contact lists.

Ideal For:

Great for users with less technical experience. Great 15% nonprofit discount. Free for up to 4,000 emails/month.

Features:

- Allows users to easily create professional-quality email campaigns using a drag-and-drop email builder and pre-designed templates
- Provides statistics such as who opened your email, how many users clicked on links within your email, if the email was forwarded on to other people, etc.
- Allows the user to easily build and segment their contact lists with a number of different classifications
- Provides a free sign-up tool that can be used on your website to add users to your email list

Price:

- A 15% non-profit discount rate can be applied to all pricing levels
- Up to 300 recipients and up to 4,000 emails sent per month: Free
- Unlimited emails: Starting at \$11/month depending on list size, or Pay-As-You-Go campaigns
- Pricing plans increase incrementally by number of recipients

Resources

Video Editing Tools

The following tools allow users to make the basic edits needed to transform footage captured with a video camera (or even an iPhone) into a well-produced video to use on your website or social media properties. The tools allow for cutting video and adding transitions, music, titles and other graphical elements.

YouTube Editor - www.youtube.com/editor

YouTube video editor allows users to edit their YouTube videos in a very basic, easy-to-use way that is great for simple videos with low technical editing needs.

Ideal For:

An easy way to cut down video that you are posting to YouTube. Not recommended for advanced editing projects.

Features:

- Allows user to cut down uploaded YouTube videos
- Allows user to add in images as well as music from an approved library of music options
- Allows user to add a basic title slide or banner
- Allows user to add basic transitions

Free subscription.

WeVideo - www.wevideo.com

WeVideo is an online video editing platform that has more advanced video editing options and a very user-friendly interface that is great for first-time video editors.

Ideal For:

Adding a little more pizzazz to simple videos you've taken on your phone with transitions, images and effects.

Features:

- Directly upload videos to platform
- Allows users to cut video
- Allows users to add music as well as audio that can be recorded through WeVideo
- Allows users to add colored or patterned backgrounds as well as overlaid text throughout the video

Price:

- Up to 5 minutes of video/month: Free
- Up to 30 mins of video/month: \$5/month
- Contact WeVideo for discount non-profit pricing at <https://www.wevideo.com/nonprofit>

Resources

Image Editing Tools

These tools would be used for the editing of images taken with one of your cameras or from a stock photo. These would be used for adding text, logos or backgrounds to images before posting them to your website or social media platforms. Some tools also allow for image effect filters and color correction.

Pablo by Buffer Image Editor - www.buffer.com

Buffer is a Twitter and Facebook scheduling platform that has built-in post measurement tools and is very user-friendly for non-profits and corporations alike. Its image editing tool, Pablo, allows users to easily upload images, sizes the image for social media and allows the user to add overlay text.

Ideal For:

Really easy way to put text on photos for social media. Looks professional and well-produced and is easy to use.

Features:

- Allows users to schedule tweets and retweets on Twitter
- Allows users to schedule Facebook posts
- Provides statistics on Twitter performance, such as who retweeted your tweets, clicked on your Tweets or mentioned your handle
- Allows the user to easily upload images and overlay text on them
- Provides a free sign-up tool that can be used on your website to add users to your email list

Price:

- Stores up to 10 scheduled posts from Twitter and Facebook with unlimited Pablo use: Free
- Stores up to 100 scheduled posts and 10 social accounts: \$10/month or 50% non-profit discount!

Pixlr - www.pixlr.com/editor

Pixlr is an online image editing platform that is great for easily editing from your desktop or mobile device.

Ideal For:

Simple tool to upload, crop and edit photos from your phone in minutes.

Features:

- Allows users to crop, rotate and add text to photos
- Allows application of basic filters
- Has red-eye and touch-up features

Free subscription.

Resources

Social Share Buttons

These tools are elements that can be added to an organization's website, allowing users to easily share the webpage on their social media properties. It will require access to edit the content of your webpages, however adding the buttons requires very little technical knowledge.

Share This - www.sharethis.com

Share This is an online social media button sharing tool which gives users a code that can be embedded into their website to display social media buttons for Facebook, Twitter, email, etc..

Ideal For:

Embedding social media buttons on your website.

Features:

- Compatible with multiple website CMS including WordPress, Drupal, Joomla, Tumblr and others, as well as mobile sites
- Allows users to choose whether the social media buttons are displayed on the top, bottom or side bar of their website
- Allows user to select small or large buttons
- Gives users a code they can embed on their website to display their own social media share buttons

Free subscription.

Cloud Storage (For large video/image files)

Video and image files can often be large and tend to take up a significant amount of space on a computer's hard drive. They are also often too large to send through email. These cloud storage options remedy this issue by allowing you to upload your files to their respective services instead of keeping them stored on your computer. You can then download these files from any computer and send them easily to other people through a private link.

Dropbox - www.dropbox.com

Dropbox allows users to upload, store and share large files that may be too big to be stored on computers or shared over email. It is secure and password-protected, and allows users to access their files from any computer or portable device.

Ideal For:

Storing videos and images online so you don't have to use USB drives.

Features:

- Creates a special "Dropbox" folder on your computer where files can be saved and automatically uploaded to your account
- Creates a personalized link for others to access and download the file, allowing easy sharing
- Free plan is large enough to fit most needs
- Easy access from Apple, Windows and Android computers and devices

Price:

- Up to 2 GB of storage: Free
- Up to 1 TB of storage: \$10/month

Resources

Cloud Storage (cont'd)

Google Drive - www.google.com/drive

Like Dropbox, this is a service that allows users to upload, store and share large files that may be too big to be stored on computers or shared over email. It is secure and syncs with your other Google services, so if you use other Google applications for your organization (such as Google Docs, Gmail, etc.) this makes a particularly nice option. However, it is a bit more convoluted of a service than Dropbox.

Ideal For:

Sharing files between users online, editing documents simultaneously. Free for up to 15GB/month.

Features:

- Creates a special "Google Drive" folder on your computer where files can be saved and automatically uploaded
- If you have Gmail, then you already have an account
- Sharing files between users is easy, although a Google email address is required for the receiver to access the file
- The free plan is significantly larger than Dropbox and enough to fit most needs
- Has fewer device applications than Dropbox, but available on most Apple and Android devices, as well as on Mac and Windows computers.

Price:

- Up to 15 GB of storage: Free
- Up to 100 GB of storage: \$2/month
- Up to 1 TB of storage: \$10/month

Miscellaneous Digital Tools

QR Code Generator - www.qr-code-generator.com

This is a free tool that creates a QR code which can be used for a number of actions, including sending someone to a designated website.

Ideal For:

Sending your center's visitors to your website or social media sites. Limited to those who have QR code reader apps installed.

A QR Code (it stands for "Quick Response") is a type of barcode that can store website URLs, plain text, phone numbers, email addresses and pretty much any other alphanumeric data. These are often included on promotional materials and signage. It can be scanned using smartphone applications, which generate an action automatically on the user's phone. For your purposes, this would likely be used to send users to your organization's website.

Features:

- Create and download a QR code graphic within seconds
- Generate a number of different types of actions with your QR code, including sending users to a website or Facebook page

Price:

- Generate more than 8 types of actions: Free
- Low-budget paid plans allow a 15-day trial and slightly more functionality

Appendix - Social Media Best Practices

Social Media Best Practices and Editorial Calendar

The following is a synopsis of ways that your organization can use social media to communicate your message most effectively and to as many people as possible. Not only does this apply to Free File messaging, but it can also be used for your organization's other activities.

KEY TERMS:

Impression: a user who has seen an ad in their search results or a post on their Facebook or Twitter feed

Hashtag (#): a symbol which can be added to a word or phrase—like #FreeFile—on Facebook, Twitter or Instagram to create a link to all other uses of that word or phrase

Retweet: the action of a user reposting another user's post to their own Twitter feed

Like: the action of a user indicating they like something on Facebook or Twitter

Promoted posts/tweets: paid advertising to increase the longevity, reach and engagement of Facebook posts, tweets or LinkedIn posts

Organic reach: number of people that each Facebook post or tweet reaches without any paid advertising

Tips to Maximize Social Media Engagement

With the ability to micro-target specific audiences and place content right on users' phones, social media campaigns are becoming an increasingly important part of reaching people in your community. Follow these guidelines on all social media platforms (including Facebook, Twitter and Instagram) to make your campaigns effective in spreading the word about Free File or anything your organization does!

1. Encourage engagement

Posting content should have two goals: engagement and actions. Actions, which usually take the form of clicks on a link in your post, are important because they get your followers to the information they need. However, you also want users to engage with your posts through retweets, likes, comments, shares, etc., because this helps more people see your content. Users are more likely to take an action when a friend shares it or they see that their friend has already taken that action. By increasing your engagement, you are also increasing the number of users who see your content.

2. Post consistently

It's important to post regularly to keep your audience engaged. If you are not posting frequently, users are not seeing your content regularly and are less likely to click it or share it. Quantity is just as important as quality. Some social media platforms take this another step further. On Facebook, if a user rarely clicks on your posts, Facebook will eventually stop showing your posts to that user. Our content calendar makes it easier to post consistently. Once you've created your calendar, you can use tools like Hootsuite, Buffer and Sprout Social to schedule your content in advance. These tools allow you to set the date/time that you would like a tweet or Facebook post to be published from your account, making posting on social media accounts virtually effortless during tax season!

If you have an important post, you may want to ask other organizations in your community with an established social media presence if they can share / retweet / repost your content, creating a feedback loop that will be mutually beneficial to your respective organizations.

Appendix - Social Media Best Practices

3. Use Visuals

Users engage with posts that include graphics or photos as much as 3x more often than they do with posts that do not include any visuals at all. If possible, the visual should be something creative that encourages the user to both engage with the post (retweet / share / like / comment) and to click on the link in the post.

However, if you do not have a specific visual for the post, sometimes using the logo for your website can work just as effectively—as long as you don't do it too often.



Find more posts like these by visiting [TaxTimeAllies.org](https://www.taxtimeallies.org)

On Twitter, you can easily include an image with your tweet. In order to do this, you will have to include two links in your tweet: one for the website to which you are trying to drive traffic, and the other for the visual.

4. Link Back to Specific Pages

When you ask a user to take a specific action in a social media post, it is important to include a link that takes them to a page where they can take that action. For example, if you are telling users how they can learn more about how to file their taxes for free, be sure to take them to a specific page with that information on it. If you take them to your homepage, they are much less likely to take your desired action because it's harder to navigate to that information on their own.

5. Track What Works

Both Facebook and Twitter offer tools to track how often your content is shared and what type of content your audience is engaging with most. You can find these tools on Facebook by logging into your organization's page as an Admin and clicking 'Insights' at the top of the page. The overview it provides shows detailed information about page views, likes and post engagements. If you are interested in more detailed information, the navigation menu on that page provides even more analytics for you!

On Twitter, click the icon with your logo in the upper right corner of the page and click on 'Analytics.' The overview page will give you a monthly look into how many times you tweeted, how many followers you gained, how many times people visited your profile or mentioned you and how many people saw your tweets. Just like on Facebook, Twitter provides a navigation bar at the top of the page to show you even more information about your followers and specific tweets!

You can also create bit.ly links to track the number of link clicks each post receives. To do this, you only need to create a free bit.ly account, insert your links into the service to receive shortened (bit.ly) versions and post the shortened links. You can check the number of clicks that link received by pasting the shortened link into your search bar and adding a plus sign (+) to the end for full analytics on how the link has performed. You can easily add a column in your content calendar that tracks all the content you post and how well it performs. This spreadsheet can then be used as a reference when developing new content to keep track of what has worked well in the past in order to create similar material.

Social media is a simple, fast way to share information with your communities. See below for a few examples of tweets and Facebook posts from our updated editorial calendar to help you spread the message about Free File.

Appendix: Social Media Sample Content

The following social media posts and ideas are available to you to help spread the news about IRS Free File to your clients and members. The materials are catered towards Facebook and Twitter, but you are welcome to use them on other social media platforms your organization or VITA site might use.

Sample Tweets:

General Free File Promotion

- With the help of free IRS-sponsored tax prep resources like #FreeFile, you can save time and money this tax season. Find out more at www.irs.gov/freefile.
- Few things are easier than filing your taxes at no cost with IRS #FreeFile. Find out how you can save at www.irs.gov/freefile.
- #FreeFile is here to help low and moderate income families save money when filing their taxes. Learn more at www.irs.gov/freefile.
- IRS-sponsored #FreeTaxPrep resources like #FreeFile are helping qualifying taxpayers file for free and save more this tax season. We are proud to be your #TaxTimeAlly! To learn more, visit www.taxtimeallies.org.

General VITA/TCE Promotion

- Want in-person help filing your taxes? Visit a #VITA or #TCE. All are staffed by volunteers who get your taxes right! Visit www.irs.gov/vita.
- Pay a visit to your local #VITA or #TCE this tax season. IRS-certified volunteers are there to help. Visit www.irs.gov/vita to learn more!
- #VITA & #TCE sites are located at community centers, libraries, schools, shopping malls & other convenient locations across the country. To learn more about #VITA & #TCE, as well as how you can become a #TaxTimeAlly, visit www.taxtimeallies.org today!

Hashtags

- #FreeFile
- #TaxTimeAllies
- #TaxTimeAlly
- #VITA
- #TCE
- #FreeTaxPrep
- #EITC

Sample Facebook Posts:

General Free File Promotion

- Want a bigger tax refund? Check to see if you're eligible for the Earned Income Tax Credit (EITC) and get up to \$6,200 back when you file. Find out if you're eligible to file your taxes securely for no cost using the IRS Free File program at www.irs.gov/freefile.
- File your taxes for free this season with IRS #FreeFile. Learn more about the program at www.irs.gov/freefile.
- IRS-sponsored free tax preparation resources like #FreeFile are helping qualifying taxpayers file for free and save more this tax season. We are proud to be your Tax Time Ally! To learn more, visit www.taxtimeallies.org.

General VITA/TCE Promotion

- Want in-person help getting your taxes done, but don't know who to trust? Visit a Volunteer Income Tax Assistance (VITA) site. All sites are staffed by IRS-certified volunteers trained to get your taxes done right and to secure you the entire refund you're owed? What's even better? it's completely free of charge. Visit www.irs.gov/vita to learn more!
- Volunteer Income Tax Assistance (VITA) sites present you the opportunity to receive in-person tax preparation assistance from an IRS-certified volunteer completely free of charge. AND, you can use your refund, and the money you save on tax preparation fees, to prepare for a better and more secure financial future. Learn more at www.irs.gov/vita.
- Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) sites are located at community centers, libraries, schools, shopping malls and other convenient locations across the country. To learn more about VITA and TCE, as well as how you can become a Tax Time Ally, visit www.taxtimeallies.org today!

Appendix: *Editorial Calendar*

Social Media - Sample Graphics

For those individuals looking for custom content throughout the tax season take a look at our editorial calendar below:

JANUARY 4, 2019



Facebook:

Today is National Trivia Day, so here is some trivia about free tax preparation. IRS-sponsored free tax preparation resources have helped individuals save over \$1.6 billion in tax preparation fees, and have secured billions of dollars in refunds for over 50 million Americans to date. You can become one of them by using Free File or visiting a VITA site to complete your taxes. Learn more at www.irs.gov/freefile.

Twitter:

It's [#NationalTriviaDay](https://twitter.com/NationalTriviaDay)! Did you know that 100 Million+ Americans can file their taxes for free? Learn if you're one at www.irs.gov/freefile.

JANUARY 7, 2019



Facebook:

4 days until you begin preparing your taxes for FREE with IRS [#FreeFile](https://twitter.com/FreeFile). Click below to learn more! www.irs.gov/freefile

Twitter:

4 days until you begin filing your taxes for FREE with IRS [#FreeFile](https://twitter.com/FreeFile). Visit www.irs.gov/freefile to learn more.

JANUARY 8, 2019



Facebook:

3 days until you begin preparing your taxes for FREE with Free File. Click below to learn more! www.irs.gov/freefile

Twitter:

3 days until you begin filing your taxes for FREE with [#FreeFile](https://twitter.com/FreeFile). Visit www.irs.gov/freefile to learn more.

Appendix: *Editorial Calendar*

JANUARY 9, 2019



Facebook:

2 days until you begin preparing your taxes for FREE with Free File. Click below to learn more! www.irs.gov/freefile.

Twitter:

2 days until you begin filing your taxes for FREE with #FreeFile. Visit www.irs.gov/freefile to learn more.

JANUARY 10, 2019



Facebook:

Only 1 day until you begin filing your taxes for FREE with Free File. Click below to learn more! www.irs.gov/freefile.

Twitter:

1 day until you begin your taxes for FREE with with #FreeFile. Visit www.irs.gov/freefile to learn more.

JANUARY 11, 2019



Facebook:

Free File is officially open for business! Click below to learn more! www.irs.gov/freefile.

Twitter:

#FreeFile is officially open for business! Learn more at www.irs.gov/freefile.

Appendix: Editorial Calendar

JANUARY 25, 2019



Facebook:

Did you know that for EITC recipients, tax refunds can be over 30% of a family's annual income? This EITC Awareness Day, IRS Free File can help make sure that you get all the refund you're owed. Learn more at www.irs.gov/freefile.

Twitter:

Today is [#EITCAwarenessDay](https://twitter.com/EITCAwarenessDay)! Learn more and get the most out of your tax return at www.irs.gov/freefile.

Twitter:

The [#EITC](https://twitter.com/EITC) can make all the difference for some families. So can [#FreeTaxPrep](https://twitter.com/FreeTaxPrep) through [#FreeFile](https://twitter.com/FreeFile). This [#EITCAwarenessDay](https://twitter.com/EITCAwarenessDay), learn more at www.irs.gov/freefile.

JANUARY 28, 2019



Facebook:

Today marks the official opening of Tax Season! Visit www.irs.gov/freefile today and find out if you're eligible for free tax time savings.

Twitter:

Today marks the official opening of Tax Season! Visit www.irs.gov/freefile today and find out if you're eligible for free tax time savings.

JANUARY 28 - FEBRUARY 1, 2019



Facebook:

It's Tax Identity Theft Awareness Week, and we want to help make sure that you don't fall victim to this type of fraud this tax season. By using IRS-sponsored free tax preparation resources like Free File, you'll be able to maximize your refund, free of charge, all through the most secure platforms available. Over 70 percent of Americans qualify—check if you're one of them here: www.irs.gov/freefile.

Twitter:

It's [#TaxIdentityTheftAwarenessWeek](https://twitter.com/TaxIdentityTheftAwarenessWeek)! Keep your ID secure by using [#FreeFile](https://twitter.com/FreeFile) to prepare taxes. See if you qualify at www.irs.gov/freefile.

Appendix: *Editorial Calendar*

FEBRUARY 1, 2019



Facebook:

Today is National Freedom Day, and we're focusing on the personal freedom that accompanies financial security. We believe that everyone deserves to be on stable financial footing, which is why we're encouraging you to use Free File to file your taxes while pocketing the difference. Save hundreds on tax preparation and put those savings to work to set you on the path to financial freedom.

Twitter:

Achieve financial freedom this [#FreedomDay](#) by preparing your tax return through [#FreeFile](#) and pocketing the savings. Learn more at www.irs.gov/freefile.

FEBRUARY 2, 2019



Facebook:

Whether the groundhog sees his shadow or not, you'll still have to file your taxes. IRS Free File and VITA services bring decades of experience to your fingertips. Best of all, you can access both completely free of charge. See if you qualify at www.irs.gov/freefile.

Twitter:

6 more weeks of winter? It doesn't matter! You can prepare your taxes using [#FreeFile](#) this [#GroundhogDay](#). Learn more at www.irs.gov/freefile.

Appendix: *Editorial Calendar*

FEBRUARY 3, 2019



Facebook:

While you're waiting for your delivery of buffalo wings for tonight's game, why don't you take some time and prepare your taxes through IRS Free File? 100 million Americans—almost as many as will be watching tonight—have used Free File to save hundreds on tax prep while saving the difference. Whether you're betting on the [TEAM 1]'s or the [TEAM 2]'s to win tonight, you can always bet on Free File as the most reliable, secure and cost-effective way to file your taxes. See if you qualify this Super Bowl Sunday by visiting www.irs.gov/freefile.

Twitter:

Before tonight's game, start your [#FreeTaxPrep](#) through IRS [#FreeFile](#). See if you qualify by visiting www.irs.gov/freefile. [#SuperBowlSunday](#).

FEBRUARY 14, 2019



Facebook:

Give your wallet some love and find out if you're eligible to file your taxes for free! [Insert State] Free File allows eligible residents to securely file their state and federal taxes at no cost. Learn more at www.irs.gov/freefile or [state specific link](#).

Facebook:

Happy Valentine's Day! With the help of IRS Free File, you can spread the love to your wallet. Learn more at www.irs.gov/freefile.

Twitter:

Happy Valentine's Day! Show your wallet a little love with IRS [#FreeFile](#). Find out more at www.irs.gov/freefile.



Twitter:

Happy Valentine's Day! With the help of IRS [#FreeFile](#), you can spread the love to your wallet. Learn more at www.irs.gov/freefile.

Appendix: *Editorial Calendar*

FEBRUARY 17, 2019



Facebook:

You can do a random act of kindness for yourself, your friends, strangers and your wallet this Random Act of Kindness Day by learning more about IRS-sponsored free tax preparation resources. Over 100 million Americans qualify to use these resources to get their taxes done right, completely free of charge. See if you qualify at www.irs.gov/freefile.

Twitter:

On [#RandomActofKindnessDay](https://twitter.com/RandomActofKindnessDay), be kind to yourself & your wallet by using IRS [#FreeTaxPrep](https://twitter.com/FreeTaxPrep) to get your taxes done! See more at www.irs.gov/freefile.

FEBRUARY 24, 2019



Facebook:

Before you start watching the red carpet this Oscar Day, see if you're eligible to get your taxes filed through Free File. The program allows you to use brand name tax preparation software to prepare your own taxes totally free of charge. And you can use the hundreds of dollars you save to buy your own red carpet look! See if you qualify at www.irs.gov/freefile.

Twitter:

Today's the [#Oscars](https://twitter.com/Oscars), and Free File's performance in helping people prepare their tax returns is winning all the awards. See if you qualify at www.irs.gov/freefile.

Appendix: *Editorial Calendar*

FEBRUARY 25 - MARCH 2, 2019



Facebook:

No need to fork over any of your hard earned tax return with IRS Free File. Get access to name brand tax software at no cost to you. Learn more at www.irs.gov/freefile.

Facebook:

This is America Saves Week, which is dedicated to encouraging Americans to save for the future. We know that even a little bit of savings can make all the difference to some families, which is why we're encouraging you to use IRS Free File or VITA services to file your taxes free of charge and save the difference. Save hundreds on tax prep and make sure you get the entire refund you're owed. What better way is there to save? Learn more at www.irs.gov/freefile.

Twitter:

It's [#AmericaSavesWeek](https://twitter.com/AmericaSavesWeek)! Use IRS [#FreeTaxPrep](https://twitter.com/FreeTaxPrep) to prepare your taxes, save more and improve your financial future. Learn more at www.irs.gov/freefile.

Twitter:

This [#AmericaSavesWeek](https://twitter.com/AmericaSavesWeek), don't wait to start improving your financial future. Use IRS [#FreeFile](https://twitter.com/FreeFile) to prepare your taxes and save \$\$ on [#TaxPrep](https://twitter.com/TaxPrep) now. Learn more at www.irs.gov/freefile.

MARCH 3, 2019



Facebook:

Today is Mardi Gras, and what better way to celebrate all things excess than to help secure yourself the entire refund you're owed and save money on tax preparation fees? If you use your refund wisely, you may even save enough for a trip to New Orleans next year! See if you qualify at www.irs.gov/freefile.

Twitter:

Happy [#MardiGras](https://twitter.com/MardiGras)! Take a break from the parades and do your taxes with [#FreeFile](https://twitter.com/FreeFile) or at a [#VITA](https://twitter.com/VITA) site. It'll be a party! Learn more at www.irs.gov/freefile.

Twitter:

Unmask a bigger tax refund with [#FreeFile](https://twitter.com/FreeFile). Find out more at www.irs.gov/freefile.

MARCH 14, 2019



Facebook:

With the help of the IRS Free File program, your refund can come full circle. Learn more at www.irs.gov/freefile. Happy Pi Day!

Twitter:

[#FreeFile](https://twitter.com/FreeFile) is here to help you save money on tax prep. In fact, Free File is as easy as Pi! Learn more at www.irs.gov/freefile. [#PiDay](https://twitter.com/PiDay)

Appendix: Editorial Calendar

MARCH 17, 2019



Facebook:

Not only is today St Patrick's Day, it's also one month until tax day! Make your own luck this tax season by using Free File or visiting a VITA site to have your taxes done for free and get the entire refund you're owed. You'll be able to use that refund to improve your financial life. Learn more at www.irs.gov/freefile.



Twitter:

Over 70% of Americans can be extra lucky this [#StPatricksDay](https://twitter.com/StPatricksDay) by using IRS [#FreeFile](https://twitter.com/FreeFile) to file taxes. Learn more at www.irs.gov/freefile.

MARCH 19 - APRIL 4, 2019



Facebook:

Your March Madness bracket may be busted, but you could still be a big winner this tax season. Find out if you're eligible for free tax preparation services at www.irs.gov/freefile.

Twitter:

You could be a big winner this tax season. Find out if you're eligible for free tax preparation services at www.irs.gov/freefile.

MARCH 20, 2019



Facebook:

Today is the International Day of Happiness, and nothing makes people happier than saving money and getting their taxes done right. IRS-sponsored free tax preparation resources can help save you hundreds in fees to paid preparers. Learn more at www.irs.gov/freefile.

Twitter:

It's [#InternationalDayofHappiness](https://twitter.com/InternationalDayofHappiness), and what could be happier than [#FreeTaxPrep](https://twitter.com/FreeTaxPrep)? Find out if you qualify at www.irs.gov/freefile.

Appendix: *Editorial Calendar*

APRIL 1, 2019



Facebook:

No joke, over 70 percent of the country is eligible to use brand name tax preparation software, for FREE, through the IRS Free File program. See if you're one of them at www.irs.gov/freefile.

Twitter:

Using [#FreeFile](https://twitter.com/FreeFile) to prepare your taxes this [#AprilFoolsDay](https://twitter.com/AprilFoolsDay) can save you hundreds on tax preparation...no joke! See if you're eligible at www.irs.gov/freefile.

APRIL 8, 2019



Facebook:

One week until tax day! It's not too late to use IRS-sponsored free tax prep resources to get your taxes done in time and to start your financial year off right. Learn more at www.irs.gov/freefile.

Twitter:

One week until tax day! It's not too late to use IRS [#FreeTaxPrep](https://twitter.com/FreeTaxPrep) to get your taxes done in time and to start your financial year off right. Learn more at www.irs.gov/freefile.

APRIL 11, 2019



Facebook:

Tax day is only 4 days away! Visit www.irs.gov/freefile today and find out if you're eligible for free tax time savings.

Twitter:

Tax day is only 4 days away! Visit www.irs.gov/freefile today and find out if you're eligible for free tax time savings.

Appendix: *Editorial Calendar*

APRIL 12, 2019



Facebook:

Tax day is only 3 days away! Visit www.irs.gov/freefile today and find out if you're eligible for free tax time savings.

Twitter:

Tax day is only 3 days away! Visit www.irs.gov/freefile today and find out if you're eligible for free tax time savings.

APRIL 13, 2019



Facebook:

2 days until tax day! Visit www.irs.gov/freefile and find out if you're eligible to file your taxes online using IRS Free File.

Twitter:

2 days until tax day! Visit www.irs.gov/freefile and find out if you're eligible to file your taxes online using IRS [#FreeFile](#).

APRIL 14, 2019



Facebook:

Only 1 day until tax day. This is your last chance to use IRS Free File. Get access to name brand tax software at no cost! www.irs.gov/freefile.

Facebook:

Today is your last chance to file your taxes using IRS Free File. See if you're eligible at www.irs.gov/freefile.

Twitter:

Only 1 day until tax day. This is your last chance to use IRS [#FreeFile](#). Get access to name brand tax software at no cost! See if you're eligible at www.irs.gov/freefile.

Twitter:

Today is your last chance to file your taxes using IRS [#FreeFile](#). See if you're eligible at www.irs.gov/freefile.

Appendix: *Editorial Calendar*

APRIL 15, 2019



Facebook:

Today is tax day, which means that it's the last day to use IRS-sponsored free tax preparation resources, like IRS Free File, VITA and TCE, to get your taxes done right and submitted on time. But that doesn't mean that this is the end of the journey. The tax refund you secure through Free File will give you the opportunity to better your financial life and begin preparing for a more secure financial future. Enjoy your Tax Time Moment, and we'll see you next year!

Twitter:

It's [#TaxDay](#)! The refund that's coming could mean the difference in your financial life. Use it well!

Twitter:

Today may be [#TaxDay](#), but you can start preparing for next tax season right now! Use your refund to better your financial life.

N/A



Facebook:

With the help of IRS Free File, you can save time and money this tax season. See if you're eligible at www.irs.gov/freefile.

Twitter:

IRS [#FreeFile](#) can help save you time and money this tax season. See if you're eligible at www.irs.gov/freefile.