



The CCAA's Mission is to advance economic security for Colorado individuals, families, and communities through maintaining and growing organizational capacity of partner agencies, providing training and technical assistance, and supporting strategic partnerships, best practices, and innovative solutions to poverty.

CABC VITA Meeting Agenda and Minutes

January 30, 2024

1-2pm

1. Welcome and Introductions/Site Updates

- Attendees: Tom Saponas, Steven Panchenko, Martha Lewis, Jessica Roschen, Liz Espinoza, Ken Tadikonda, Barbara Cannon, Jerry Ryan, Mary Moon, Pat Vice, Vicki Rector, Bonnie Weber, Kate Shea, Alyson Robnett, Deborah Rodgers, Jon Stone, Sean Schweiger, Roberta Herron, April from CECAA.
- General Site updates
 - Tom S. Has already begun his tax filings, and served 8 people
 - Martha L. Has also begun the season between her two sites, collectively having over 56 volunteers
 - Barbara C. She will begin her tax season on February 3rd but reports that most of her appointment slots are booked out. She mentioned that most of the people returning are coming as a result of word of mouth
 - Jerry Ryan will open up his site on 1/31/24
 - Mary Moon is opening her site on 2/7/24 and already has 50 people on her waitlist
 - Kate Shea is starting 2/8/24 and reports a solid flow of people already enrolling.
 - Jon Stone is starting on 1/31/24
 - Bonnie is starting on 2/1/24 and is excited to have 20 new CSU students on board, Library site and Senior Center are ready
 - Vicki is starting 2/8/24 and announced she has the capacity to file 500 returns this year and half of the appointments have already been filled
 - Pat will spread the word about her VITA site in Limon on Thursday with her food distribution program.

2. CO Filing dates - estimated February 12, 2024

- Discussion about if returns sit in queue and automatically file on CO date or if they need to be sent through. Conflicting information received. We will continue to monitor and share.

3. Site Visits/Monitoring Schedules

- All site visits have been confirmed - thank you

4. Collecting Monthly Report Data

- Starting this month CCAA will need to start submitting monthly reports for each site. In these reports, we will be asking each site to provide us with specific site data that needs to be pulled from Taxslayer. The data that is needed is on the Colorado VITA website under the "site coordinator" tab, from there you will scroll down and find the forum that says "Monthly Progress reports". In this forum, you will see all the data we need to collect and

submit. Martha and Steven have created a video and slides on the website under the site coordinator tab on how to pull and organize the data as well as how to submit it. These data reports need to be submitted monthly by the 5th.

- Important reminders:
 - You can submit using the forum, but if this is not something you are comfortable with, please communicate with Steven how you would like to share the data
 - Please do not combine January and February reports even if you only filled as little as one day

5. How to Report Monthly Data - www.coloradovita.org

- To submit the data you simply go to the VITA website, go to the site coordinator tab scroll down till you see the “Monthly Progress Reports” forum, and plug in your data

6. Action Items/Reminders:

- Submit the first monthly progress report by February 5th
- Reminder Mary shared new income limit AGI \$64,000 or less

7. Meeting Close – Next Meeting February 6, 2024 at 1pm