

United Way of the Capital Region's New Site Checklist

Finding new sites is easy – finding the RIGHT new site is a bit more challenging. This checklist was developed to help evaluate potential new sites. Our coalition made some pretty big mistakes along the way, mostly by forgetting or not thinking of some important questions to ask and at times we paid the price for that!

We have also come to the realization that while we appreciate sites being willing to host us at no charge, we need more -- especially from the sites that are a for-profit business (i.e. banks, financial institutions, colleges, etc.) Being a partner of a coalition with the kinds of results we have is a great image booster for our sites, particularly since we list our sites as coalition partners on all our flyers, signage and other promotional materials. If sites are unwilling to do more than offer space, especially in the areas of outreach, steering committee participation, or volunteers, it's probably worth looking at a different site.

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- Is the site easily accessible to your target audience? (i.e. site is on the bus route, site has sufficient parking for both clients and volunteers, site is wheelchair accessible, etc.)
 - Is there signage that will allow your clients to easily find the location?
 - Is there a room or area far enough away from where the tax preparation is occurring for clients to wait without being too noisy or disruptive to the tax preparers?
 - Is there high speed internet access? Not having the appropriate internet access is really a deal breaker!
 - If the site is allowing you to use their equipment, are there enough computers and/or printers for the number of volunteers you anticipate having at the site?
 - Is there sufficient space for quality review and for follow-up on rejections or other issues by the site coordinator or other volunteer?
 - Are the computers in good working order? It's important that someone from the coalition actually check them out – your idea of this may differ from the site. We can't stress enough how critical this step is. If your staff doesn't have enough time, consider using a volunteer with IT experience.
 - If the site is providing laptops for you to use, do you need numeric keyboards, or are your volunteer comfortable using the number keys across the top of the keyboard?
 - If using a computer lab of any type, is it big enough to allow enough space between preparers to afford privacy to clients? You'll need to take this into consideration when determining if there is adequate equipment; i.e. you may only be able to utilize half or one-third of the computers in a lab setting.
 - If you intend to utilize interpreters, is there sufficient space at the computers to accommodate the clients, preparer and interpreter and still provide privacy?
 - Will the site provide some sort of storage where you can securely store paperwork, supplies and/or other items needed for tax prep, or will volunteers need to take everything with them at the end of each session?
 - If you are bringing your own computer equipment, is there secure storage for laptops/printers or will volunteers need to take equipment with them after each session?
 - Will the site provide any assistance in publicizing tax preparation services?

- Is the site willing to answer phone calls regarding the tax preparation services, or is there a plan to refer the callers elsewhere?
- If using on-site printers, will the site be providing the toner cartridges or will they expect you to do so? Depending upon the type of equipment you'll be using, these can be costly and add up quickly, so you'll want to make sure your budget can accommodate it.
- The same goes with other supplies – what should you be providing and what are they willing to provide?
- You'll need the name of an individual at the site who will be your designated contact person. This is especially important since tax prep occurs during winter months – you'll need that person to assist in developing and implementing a plan to cancel a session due to inclement weather.
- Some sites, especially universities or colleges, may require a written agreement and you should be prepared for this. They may also require that you provide some type of insurance which should be easily obtainable through your regular carrier.

Below is a list of office supplies and other items that are generally needed at sites:

- Pens, pencils
- Blank envelopes (for mailing local returns)
- Post-it notes
- Manila folders
- Paper clips
- Staplers/staples
- Rubber bands
- Lined tablets and/or scratch pads
- Highlighters
- Markers
- Binder clips
- Paper – generally required at the large, high volume sites
- Toner cartridges – generally required at the large, high volume sites OR non-profit sites that are on shoestring budgets!

We also began providing shredders to sites that do not have one when we learned that our volunteers were shredding excess documents on their personal shredders at home.