

Our business plan for 2016

In 2015, CAS launched a business plan designed to improve the organization's impact and reinforce the CPA's contribution to the community. The plan covers several years and here are some actions planned for 2016.

- # **Executive Director.** We hired a half-time Executive Director, Sheryle McMillan, in January 2015. She was a welcome addition, but it's now apparent she must full-time to achieve the more ambitious business plan we have set out. Providing a budget for the extra hours is the key, and Sheryle is willing to give up other commitments to become full-time.
- # **VITA.** We've committed to serve 10 VITA sites in 2016, up from 8 last year, providing trained site coordinators who oversee volunteer tax preparers. We are able to make this commitment because there is a demand for our services, all of our 2015 site coordinators have renewed for 2016 and we have recruited new ones to our team. All this is thanks to the loyalty of CAS and CTCPA members. Their service includes taking IRS training and supervising one or more work shifts at our sites. We must now expand this service beyond Northeast CT into Central and Southwest CT. We'll be touching this area during the 2016 tax season.
- # **Financial coaching.** Our VITA clients need more than a tax return and an EITC refund. They need help to deal with the financial challenges of life. Other people can seek a CPA or CFP for help but these people cannot. Beginning in February, we will offer this service selectively at our VITA sites, which requires recruiting and training volunteers for the task. We already have CAS members with this skill, but we will need more people and also a delivery process, including practice aids and training. Sheryle brings hands-on experience in the area. We have also made contact with financial professionals who are willing to help us launch the service.
- # **NFP organizations.** As 2015 began to unfold, we were surprised to find the leaders of small NFPs reaching out to us for help. We learned there are over 18,000 small NFPs in Connecticut. They can't afford CPA fees and are going it alone, including the demanding IRS form 990 reporting process. In most cases, our support can be as little as some advice or coaching from one of our volunteers. In others we are called on to straighten out a problem the NFP has.
- # **Volunteers.** We are starting to strain our volunteer base. In some cases, we are asking CAS members to handle multiple cases. They are pleased to help, but we cannot wear out our welcome with them and we also want to spread out the opportunity to serve. Besides finding the volunteers, we must also invest money in case-monitoring software and good ways for our members to deal with us electronically.
- # **Web.** We will improve the impact of our Web site. We must improve our number of clicks and provide for better visibility on mobile devices.
- # **Outreach.** We must improve our outreach activities: to CAS members, to CTCPA members, to NFPs and to funding sources.