

Module 11: TALKING TO TAXPAYERS: Cultural Sensitivity

Special thanks to: Pennie Clayton of United Way of Tarrant County for her contribution to content provided in this module.



@ProsperityNow
prosperitynow.org

By the end of this module you will...

- Be aware of cultural sensitivity.

At the end of this module, you will be prepared to talk with your tax client to ensure they will leave knowing their tax return was prepared with accuracy based on the information the taxpayer provided and your knowledge as the tax preparer. It is important that the taxpayer knows that they have been treated fairly and they understand their rights.



@ProsperityNow
prosperitynow.org

Cultural Sensitivity is:

- Understanding your own culture
- Being able to appreciate each other
- Honoring confidentiality
- Unconditional respect for yourself & others
- No put-downs
- Speaking your truth
- Agreeing to disagree
- Everyone having the right to pass
- Experiencing discomfort
- Expecting and accepting non-closure



@ProsperityNow
prosperitynow.org

Why is Cultural Sensitivity Important?

- Creates good mental health in the VITA site environment
- Holds people responsible for their actions
- Fosters an environment that embraces diversity
- Improves working relationships
- Improves problem-solving and conflict resolution
- Increases productivity and engagement
- Reduces stress in the VITA site environment
- Supports a VITA site environment of fairness



@ProsperityNow
prosperitynow.org

How to Create a Culturally Sensitive Environment

- **Listen** (Listening to the taxpayer)
- Recognize and value diversity
- Value the contributions of all taxpayers, VITA volunteers, and staff
- Be positive in your communication with your taxpayers, VITA volunteers, and staff
- Treat everyone equally and fairly
- Listen to others
- Willingly & sincerely apologize to a taxpayer when something you say or do may have offended them
- Ensure communication and feedback
- Be respectful of the VITA site environment



@ProsperityNow
prosperitynow.org

Don't...

- Be demeaning
- Be offensive or make comments that are unwelcomed
- Yell or shout
- Use profanity
- Do name calling and/ or making fun
- Show sarcasm
- Tell or repeat offensive jokes
- Be demeaning, belittling or humiliating to someone
- Ignore someone

Re-Cap

- Greet taxpayers warmly.
- Speak with confidence.
- Take time to build rapport.
- Explain what you are doing with each step of the tax preparation process.
- Offer to answer questions.
- Deal with conflict with empathy and understanding.
- After carefully listening to a complaint, get your site coordinator involved.
- Recognize and value diversity.
- Treat everyone with dignity and respect.
- Always be open-minded and fair.



@ProsperityNow
prosperitynow.org