

The Aspire Calgary Financial Empowerment Collaborative (Aspire) **streamlines its tax filing process** with Forms On Fire, improving its understanding of its annual impact, stakeholder relationships, and community offerings

**Client Industry**

Nonprofit Organization

**Location**

Calgary, Alberta, Canada

**Application**

Data Collection and Reporting

Situation

Aspire's inefficient, disordered tax filing process risked losing tax clinics' participation.

With origins dating back to 1991, the Canadian nonprofit organization Momentum focuses on reducing poverty and strengthening the local economy. Momentum also stewards the Aspire Calgary Financial Empowerment Collaborative (Aspire), a network of more than twenty organizations in Calgary, Alberta, that collaborate to deliver financial empowerment interventions and programming to Calgarians living on lower incomes. Beyond offering financial coaching services, matched savings programs, and RESP information, fourteen Aspire partners provide free tax clinics to low-income community members.

"More than ten thousand people a year are supported through the tax clinics," said Aspire Leader Colin Bath. "On average, someone living on a lower income in Canada might get about \$3,500 back after doing their taxes, which is substantial"

Originally, the partners manually documented the tax files on paper, and then scanned the information and uploaded it to a SharePoint site. This method came with a broad range of problems.

"There wasn't a lot of standardization around that process," said Colin. "Some people used multiple files for a single tax form. A lot of forms would get lost. They weren't always readable. There were also often access issues with SharePoint."

The inefficient, disordered process made it difficult to communicate to key stakeholders about Aspire's successes. It also risked losing the tax clinics' participation.

"Aspire tax clinics are based on the Community Voluntary Income Tax program," said Colin. "If we don't have an efficient, easy system that works for our hardworking partners, that can potentially influence a partner's willingness to participate." *(Continued)*

“ You don't want to waste time doing digital transformation yourself. You want to know the right questions to ask, and then you want **someone to build the infrastructure for you**, and that's what Forms On Fire did. **That was very valuable.**”

Colin Bath, Aspire Leader, **Momentum**

Situation

(Continued)

Aspire sought a completely digital solution that its partners would find accessible and easy to use, regardless of users' technological literacy. Substantial security measures and multiple language options were also priorities for the partners. Aspire worked with a consultancy that found five software options that might suit the partners' criteria, and the one that resonated with the collaborative most was Forms On Fire.

"Forms On Fire was just more professional and comprehensive than the other offerings, which didn't look as polished, easy to use, or robust," said Colin. "Forms On Fire was far and away the clear winner that met the most criteria."

Solution

Partnering with Forms On Fire allowed Aspire to quickly and securely process ten thousand forms in a year.

Forms On Fire deftly handled the design requirements based on the input of the fourteen different partners and created a customized workflow that can adapt and change along with Aspire.

"We can modify the system and the workflow to suit different needs," said Colin. "Originally, we worked with Forms On Fire to build a workflow that included verification methods, but we realized we needed a separate streamlined system without any verification due to the volume of tax filings. The Forms On Fire system is structurally flexible, so it allowed us to build that new workflow."

Partnering with Forms On Fire allowed Aspire to quickly and securely process ten thousand forms in a year. The digital nature of the platform also resulted in greater transparency by granting Aspire a comprehensive view of its impact.

"With a click of a button, I can find out right now what our impact is in real time," said Colin. "I can now communicate to all our stakeholders about how many tax filings we have and when they've been submitted, so they more fully understand their contributions to this larger effort. We also have access to anonymized data about the number of Canadian citizens, seniors, and those living with long-term disabilities or receiving income support. This kind of data helps us tailor the interventions we conduct and the resources we offer to different partners. It allows us to refine our systems as we go."

Aspire's partners have been pleased with Forms On Fire as well.

"We interviewed our partners to assess the solution's efficacy, and we heard a lot of positive testimonials," said Colin. "They said it was enjoyable and easy to use, and some said the process takes half as long as it used to. That really speaks to its impact."

Results + Benefits

High-Quality Customer Support

"The number one thing that stood out about the Forms On Fire team is that they provide strong customer service," said Colin. "That was a selling point. They're timely and quick in their responses, and they'll meet with you if you need more extensive support."

Adaptable Solutions

"As things change and grow, we'll need new kinds of features built into the system, and Forms On Fire has the flexibility to respond to that," said Colin.

Saved Time

"A sample of our partners that we interviewed said they saved on average ten minutes per client, and others said they saved up to thirty minutes," said Colin. "That means we saved between one thousand and five thousand hours of reporting time as a result of using the system."

Useful Analytics

"The real value is in that we now have access to secure and anonymized demographic data about the people we're serving," said Colin. "It allows us to know the community we support in a better way."