Putting your skills into practice

General Features



07 June 2021

Amy Lawton and David Massey explain how a team of students and tax professional volunteers ran a tax clinic to provide community support

When we last wrote about the North West Tax Clinic (NWTC) in Tax Adviser (‘Opening our doors’, October 2020), we were about to welcome a team of tax professional volunteers to support our students and their low-income clients. This was following a successful pilot of the project, between January and March 2020, where a small team of students from Lancaster University and the University of Central Lancashire helped to save taxpayers over £15,000 in tax repayments and waived penalties.

The NWTC ran again for the full 2020/21 academic year but we needed help. Clinic meetings are held with students from the universities, supervised by qualified tax

professionals. They can assist clients with:

- completing their self-assessment tax returns;
- appealing against penalties for tax returns filed late;
- explaining PAYE codes and assisting clients to get them changed if they are incorrect;
- explaining tax calculations from HMRC and appealing against these if they are incorrect; and
- asking HMRC to cancel tax returns it has issued if clients do not meet the requirements to complete a tax return.

Our call for volunteers was met with positivity from the tax profession and the clinic is now supported by six professional tax advisers. The University of Manchester joined the NWTC in February 2021.

Our goal

Our professional and student volunteers have handled a variety of cases. Our clients are on a low-income and are quite often struggling with other things in their lives as well. To many of them, HMRC is a daunting prospect. The NWTC helps to demystify their tax obligations and liaise with HMRC on their behalf. The aim is to set them straight with their taxes and empower them to manage their own tax affairs in the future. Common client issues include PAYE tax codes, removing clients from the self-assessment system, and appealing penalties.

During 2020/21, our volunteers once again saved clients thousands of pounds in waived penalties and refunded tax, while also helping those who owed tax complete their returns to get their affairs up to date and guiding others through the SEISS rules.

Benefits of volunteering

Both our students and professional volunteers accomplished a lot during their time with the NWTC. For the students, having professional tax advisers to supervise their work is invaluable. They not only experienced the tax issues of real-life clients, but also had the opportunity to talk to professionals with years of experience in the field.

Our professional volunteers were exposed to tax issues that are a world apart from the fee-paying client and they gained experience of managing the students.

Here are the experiences of just some of our volunteers:

> ‘I really enjoyed my time volunteering for the NWTC. I worked with a number of talented students who really showed an interest in the cases brought to the clinic and we managed to get some great results for the clients. It was great to be involved in
> the programme over the last 12 months and I hope to be involved again in the future.’
>
> Sophie Chamberlain, Senior Manager, ETC Tax

> ‘The students have shown a great deal of technical ability, tenacity and patience in dealing with their cases. I was beginning to wonder if it was a real scenario as so many obstacles were thrown in their way! Those skills will serve them well in whatever they do in the future. Hopefully, they will get an understanding that “real world” tax isn’t about numbers, tax cases and right answers. It requires a flexible and open-minded approach backed up with a dash of common sense.’
>
> Peter Bean, Director, PB Taxation Services

> ‘It has been fantastic to be part of a project which gives back to our local community and supports the development of students.’
>
> Simone Brown, Tax Manager, Rotherham Taylor Accountants

We would like to thank those volunteers (and Thomas Slipanczewski and McCloud Ng’onga) for the time they have given to the NWTC, as well as to Gail Mackie and her colleagues at TaxAid who have sponsored the NWTC and provided invaluable support to us. The NWTC will run again in October 2021. The project has grown, and the Scottish Tax Clinic plans to start at the same time (based in the University of Edinburgh).

We hope that the growing tax clinics will be able to provide pro bono income tax advice to more people, and so give back to both our communities and our students.

If you would be interested in volunteering your time, please email alawton@ed.ac.uk (Scottish Tax Clinic) and diamassey@uclan.ac.uk (NWTC).

OTHER ROUTES TO VOLUNTEERING

Georgiana Head takes a look at some other ways you can use your skills and volunteer in the community.

I started my stint volunteering in schools as a school governor for a secondary school in Halifax. In 2019, I was asked whether I would chair a new governing body for a school in the same multi-academy trust called Trinity Academy Sowerby Bridge.

Trinity Sowerby Bridge had joined the trust in 2018 – and had previously been a failing school which had been put in special measures. By 2019, it had become one of the most transformed academy schools in the UK (among the top 1% of improved schools and one of the highest performing schools for progress in the Calderdale Local Authority). This was no mean feat when the school's catchment area is mainly from the lowest 3% of poverty in the UK. The key to the transformation is the aspiration of all the staff towards the pupils and their outcomes. They say it is about doing simple things well, all the time.

I've found that I have really bought into the ethos of the school. I'm proud of the governing board that we have grown and the work it does, including link governor visits, helping with 'last chance' turnaround meetings to try and get pupils off the track to exclusion (what we used to call expulsion), and formal exclusion meetings.

I've gained HR experience, employment law knowledge, a deeper understanding of risk management, safeguarding and Covid-19 safety and have learned a raft of education speak. I've also picked up some Slovak language skills to speak to Roma parents and buffed off my old finance skills to read and question budgets.

Although it has required considerable time commitment, it has been a deeply enjoyable experience. I've also found that the skills I have learned around chairing meetings and understanding how an educational establishment works has helped me in my other volunteering roles with ATT.

I would heartily recommend becoming a governor to any tax professional. Your day to day work skills – such as being able to analyse reports, read legislation and read accounts –make you highly valuable to schools. You may, though, spend several months bemused by educational acronyms (we now give new governors a crib sheet of common abbreviations in education).

A very topical undertaking

I think volunteering is a hot topic at the moment because of the hoards of people helping with the Covid-19 vaccination programme. When I had my first vaccination, I came out feeling rather misty-eyed at seeing how well run and slick the set up was and how enthusiastic the volunteers were.

I talked to Angela Ferguson, an employment taxes director at Saffery Champness who is a volunteer vaccinator. She was asked to participate having completed a St John Ambulance first aid course. As she explained: ‘I looked at the different roles on offer and decided to train as a vaccinator, which meant a lot of online medical training and a day’s face to face training, practising on artificial arms on a Saturday in January.’

On 26 February 2021, Angela undertook her very first shift at Chester racecourse. ‘I was amongst medical professionals and other volunteers from St John’s and the Fire Service. I was a little nervous but had an amazing nurse to help demonstrate and run through all the tasks and forms, and then she watched me vaccinate my first five people. The operation of the venue was fantastic, very slick and – most importantly – safe. And the excitement of most of the over 60s we were vaccinating was amazing to see. They were thrilled to be getting the chance to get back to some kind of normality.’

Angela added that it was ’was lovely to get out of the house and actually see and help people. It has been one of the most rewarding experiences I’ve had.’ She looks forward to every shift and vaccinates some 65 people at a time.

How you can benefit

Volunteering enables you to use the skills you learn at work in a new way. It also helps you to gain new skills which you can transfer to your career. For me, most importantly, it gives the satisfaction of being able to give back to your community. As a recruiter, I can also assure you that it looks good on your CV.

If anyone in West Yorkshire wants to hear about opportunities on school boards, we are always looking for more governors. You can email me at georgiana@ghrtax.com.

Georgiana Head is a Director at Georgiana Head Recruitment specialising in recruiting tax professionals. She trained in tax and is an ATT Council Member. In her spare time she is a school governor.