

Donated Funds October 2011

Summary: This document provides guidance on using donated funds to purchase additional computer equipment. Topics covered are options to buy equipment directly from the National Office as well as other sources and the recommended type of equipment to buy if not purchasing through the National Office.

Purchasing equipment with donated funds

AARP Foundation Tax-Aide policies for Donated Funds are spelled out in the *Policy Manual* which should be used in conjunction with this information.

Computer manufacturers produce two general categories of product. The first, professional versions are intended for sale to companies, organizations, and government agencies and are normally purchased using corporate purchase orders. The second, home versions, are produced for sale to individuals, and are generally purchased through retail stores. As a rule of thumb, professional versions are more robust and therefore more expensive than home versions.

Vendors are typically not willing to sell home versions to companies or professional versions to individuals. Therefore, AARP Foundation Tax-Aide National Office can only purchase professional versions in bulk for distribution to volunteers. State organizations that can afford only a few machines should purchase home versions.

If an AARP Foundation Tax-Aide state organization wishes to use a monetary donation to purchase computer equipment, their first preference may be to buy the same type of computer or printer furnished by the AARP Foundation Tax-Aide National Office. To do this, email your request to taxaidetech@aarp.org, and the National Office will process it and use the donated funds your SC authorizes to make the purchase.

If purchasing systems with donated funds, outside of the AARP Foundation Tax-Aide National Office, please make sure that the equipment at least meets the AARP Foundation Tax-Aide minimum hardware requirements; see the "System Requirements" document on the Extranet.

Although it is up to the state's management team as to which version they will purchase, additional considerations, apart from the purchase price, should be factored into the decision. These include:

- a) Home version computers may need additional memory or higher speed processors to accommodate future updates to tax software.
- b) Any additional non-tax software required for use in the AARP Foundation Tax-Aide program must also be purchased using donated funds
- c) If AARP Foundation Tax-Aide moves toward a national computer servicing and support model, these home version computers may not be included in the

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national support contract. As a result, if these locally purchased computers break or need repair, these costs may not be covered by any such national contract.

To expend donated funds, an individual volunteer should purchase the equipment and submit reimbursement expense statements as per the Policy Manual. These expenses must be approved by the State Coordinator.

Equipment purchased using donated funds must be included on the annual equipment inventory.