AARP Foundation Tax-Aide

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AARP Foundation Tax-Aide is offered in conjunction with the IRS.

Partnership and Communications Guide

October 1, 2011 – September 30, 2012

Website for the public**:** **www.aarp.org/taxaide**
Website for volunteers (Extranet): **www.aarp.org/tavolunteers**

Over 2.5 Million People Served Annually!

AARP FOUNDATION

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Key Relationships for the AARP Foundation Tax-Aide

Partnership and Communications Specialist (PCS)

The PCS maintains direct relationships with a tremendous number and variety of people. Good communication is essential to effective statewide promotions.

- **State Management Team (SMT).** The PCS plays an integral role on the SMT. They ensure that all specialists, coordinators, Instructors and Counselors in their state communicate standard program messages to the public. They are responsible for attending all initial partnership meetings and following through on all related partnership activities in regard to program promotion, recruitment, site location and equipment. They are chiefly responsible for directing the state's communications plan with the goal of recruiting volunteers including diverse volunteers to the program and informing the public about the availability of our free service. PCS's interface most with their State Coordinator (SC).

- **District/Local and Communications Coordinators (DC, LC and CC).** The DC is the lead implementers of state plans. They manage LCs and CCs, respectively, in the implementation of a local communications plan, designed ideally with guidance from the PCS.

- **AARP State Office Communications Staff.** There is a staff member responsible for overall state communications within each State Office. Contact the designated AARP communications lead (Assoc. State Director or designated liaison) to discuss your communications needs and to determine others with whom you should work within your state (staff and volunteers) to achieve your goals. These individuals can offer guidance in helping you develop your state's communications plan, obtain media lists, brainstorm on ways to cross-promote with other AARP programs, and recruit volunteers as well as useful tips for reaching the media.

- **AARP Foundation Tax-Aide National Office.** Communication with the national office is a key resource for the PCS. Staff will guide each PCS through information concerning partnerships and subsequent activities as it relates to the partnership. The national office provides training materials including promotional samples and can provide other assistance as necessary, such as developing press release copy and obtaining media lists.

Section One: General Information

Partnership and Communications Specialist (PCS)
The Partnership and Communications Specialist (PCS) works with the SC and the SMT to implement and maintain partnerships, program publicity and communication activities at the state/split-state level. The official PCS volunteer position description is located as Appendix A. A general job description for PCS with emphasis on the position's roles follows.

- Designs and implements comprehensive state partnership and publicity campaign to address needs of the AARP Foundation Tax-Aide program in the state as determined by the SC and the SMT.
- With the SC manages and develops partnerships within the state
- Maintains a close working relationship with AARP's State Director and Associate State Director, State Communications Coordinator (SCC), where they exist, and other communications staff. Enlists help with program promotion and recruitment while keeping them informed of program publicity activities.
- Provides guidance and support to District/Communications Coordinators in implementing the program in their area of the state.
- Ensures that all state-level program materials (internal and external) contain boilerplate language.
- Ensures that sites are identified with proper AARP Foundation Tax-Aide signage and promotional materials.
- Builds and maintains a local file of media contacts.

Communications Coordinator (CC)
This district level position can be very critical to the successful completion of the publicity side of the PCS position. The CC helps in identifying local partnerships to help the DC.   The CC works with the DC and LC to implement and maintain partnerships, program publicity and communication activities at the district and local levels. The official CC volunteer position description is located as Appendix B. A general job description for CC follows.

- Supports and identifies with the PCS, DC and others as appropriate, program needs in their district such as:
    - Recruitment-leaders, Counselors, and/or increasing volunteer diversity.
    - Sites-accessible, conducive to maintaining taxpayer privacy and/or willing to support e-filing with computers, phone lines, etc.
    - Equipment-free copying, PCs, printers, etc.
- Works with DC and LC as appropriate, to oversee development and implementation of AARP Foundation Tax-Aide Partner Program in the district as it relates to recruitment, program promotion, equipment and/or new sites, as necessary, and to ensure that AARP Foundation Tax-Aide honors its side of the partnership.
- Ensures that all local-level program materials (internal and external) contain boilerplate language.

The CC is appointed and supervised by the DC with concurrence by the SC and in coordination with the PCS.

Publicity is a statewide responsibility, but in order to effectively support the program, publicity must also be heavily focused on the local district level market. While state publicity in major papers and communications outlets are important, traditionally AARP Foundation Tax-Aide has experienced better results long term results from local publicity. This takes the form of local, daily, weekly or monthly newspapers, local radio and TV stations, and local newsletters such as the local senior center newsletter. With guidance and assistance from the PCS the local CC is much better positioned to identify and interface with the local media.

National Assistance

A wealth of experience and help is available from the AARP Foundation Tax-Aide National office. Contact the national office to bounce ideas off people who experience daily contact with numerous other PCSs and also are working to develop national publicity and partnership efforts.

Prior to writing grants or if you have any questions or need guidance on a publicity campaign please contact:

Marcy Gouge
Partnerships and Grants
Assistant National Director
1-800-424-2277, ext 32197
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Email: mgouge@aarp.org
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Interface with State Management Team (SMT)
The role of the State Management Team (SMT) is to serve as the AARP Foundation Tax-Aide leadership team for the state/split-state. The State Coordinator serves as the leader of the SMT volunteers holding the following positions: Administration Specialist, Training Specialist, Technology Specialist and Partnership and Communications Specialist. The primary role of the SMT is to make certain that the program is run in an efficient manner in their state/split-state and to ensure that each of their specialty area is in sync with the needs of the other parts of the program. Although, each SMT member holds responsibility for an area of expertise, they can and should offer suggestions and think broadly about impact of decisions to the program as a whole. As a member of the SMT, your role as PCS is to provide counsel and guidance to the State Coordinator (SC), volunteer state management team, District Coordinators and Communications Coordinators on the areas of partnerships and communications. The PCS serves as the subject matter expert on developing statewide or local partnerships, seeking and obtaining grants or donations, and developing a state communications plan for the program. As such, in addition to the counsel and guidance you provide to volunteers in the SMT and training to volunteers in the state/split-state, you may be called upon from the National Office to provide feedback and suggestions on program enhancements intended to streamline processes and procedures for the benefit of all volunteers within the AARP Foundation Tax-Aide program.

As the PCS you have three complex roles within the SMT:
1. Communications where you guide and assist the DC to obtain local publicity for the program in the area.
2. Partnership manager where you and other members of the SMT determine the needs of the state that can be met with partnerships (site locations, volunteers, equipment, etc) and then develop and implement plans to meet state needs. In this role you may work alone or with other members of the SMT or with District and Local Coordinators depending on the level of involvement and the desired results.
3. Represent the national office in your state with the information and documentation that is available from both the AARP Foundation and AARP Foundation Tax-Aide, to include communication articles and publications.

Representative Schedule
The workload of the PCS position is heaviest during non-tax season. Prior to the tax season, you may be involved in recruiting efforts and new site partnerships. You are actually less busy during the actual tax season. Then your workload again increases after the tax season as you start the work to fill gaps that are identified by the DC and the rest of SMT in the end of season review. A sample timeline/schedule follows.

As Scheduled Recurring Activities
- Monitor and assist SMT in promotion and recruitment
- Work to develop local and state partners. Attend all partnership meetings in state (Keep the SC informed. Invite the SC to one of the early meetings for informational purposes)
- Attend State Management meetings
- Submit monthly expense statement for all expenses incurred.

Activity Calendar

JANUARY	FEBRUARY
• Review results as known on promotion and recruitment and crisis react if required • Assist CCs or their equivalent in publicizing program at the local level. • Attempt to get state coverage for AARP Foundation Tax-Aide through either statewide media releases or in conjunction with your respective AARP State Office Associate State Director for Communications	• Assist CCs or designee in publicizing local programs. • Solicit and receive customer testimonials and site photographs from DCs and CCs for use in state and national promotions. Submit a copy to the national office. • Begin to collect names and organizations that are supporting our program • Analyze plans and operations for next year corrections • Monitor the activities at new sites for assistance • Support DC • Meet with AARP State Office for promotion at state and local level
MARCH	APRIL
• Prepare and launch an enhanced mid-season promotional campaign to call attention to site locations. Use mid-season statistics, stories about unusual customers and volunteers to attract attention. • Assist DCs and or CCs or their equivalent in promoting the program at the local level • Promotion for tax deadline filing assistance • Write thank you letters to helpful media contacts.	• Meet with SC and District Coordinators to evaluate effectiveness of the state communications plan and begin brainstorming for next season. • Continue to promote year-round tax assistance service available via the web at www.aarp.org/taxaide • Prepare report to State Coordinator on pluses and areas to improve
MAY	JUNE/JULY
• Receive appointment letter • Contact AARP State Office to get fall recruitment through AARP *The Magazine* inkjets.	• Attend SMT National Training during your first year. (Your State Coordinator will provide information on when and where.)
AUGUST	SEPTEMBER
• Meet with the SC and SMT following training to discuss partnership goals for site locations, recruitment, equipment and program publicity and state communications goals: volunteer recruitment in the fall and program promotion in the winter and spring. • Confer with your AARP State Director and/or Associate State Director for Communications about your communications goals for the year and solicit help and ideas. • Assess your state volunteer recruitment needs within your states with the DC and in conjunction with the SC. • obtain up-to-date media lists	• Begin intensive volunteer recruitment campaign as outlined in the state communications plan. • Assist DC in recruiting CCs. • Review last year's efforts for changes to this year's plan • Meet with AARP State Director and AARP Foundation Tax-Aide State Coordinator to ensure synergy • Develop State Communications Plan • Canvas District Coordinators for promotional needs

• Develop relationships with outside partners. • Develop state communications plan and submit final copy to the SC, SMT, AARP State Director, and CCs.	
<u>OCTOBER</u> • Attend state planning meeting and present state plan. Explain role in partnerships and plan for upcoming year. Explain how to order publicity materials and stress the importance of everyone's role. Ensure DCs include AARP Foundation Tax-Aide boilerplate language and logo on all materials and brand all sites. • Modify plan as result of SMT feedback • Implement plan through DC Recruitment effort • Attend District Meetings to review and help in recruitment and advertising and to train CCs or their equivalent in partnerships, recruitment and publicity • Continue recruitment campaign.	<u>NOVEMBER/DECEMBER</u> • Monitor results of recruitment plan and adjust as necessary • Support District Coordinators and Communications Coordinator to develop advertising • Attend Training • Begin preparation for program promotion campaign (promote service and location of sites).

Section Two: Partnerships and Coalitions

A **Partnership** is formed between two groups or organizations that receive mutual benefit by joining efforts to accomplish a goal. (Appendix C)

A Coalition is formed among more than two groups or organizations that receive mutual benefits and have. The key difference between a partnership and a coalition is not the number of members. Rather it is that a coalition has a separate role and mission as a group. AARP Foundation Tax-Aide Partnership and Coalition Objectives and sample activities:

- To acquire in-kind donations and support resources for AARP Foundation Tax-Aide sites locally and/or nationwide. An example would be a partnership with a corporation to provide laptops.
- To increase the AARP Foundation Tax-Aide volunteer cadre by joining volunteers from another organization. An example would be a partnership with Retired Senior Volunteer Project (RSVP) to provide volunteers for an AARP Foundation Tax-Aide site.
- To increase the number of AARP Foundation Tax-Aide sites or replace sites with ones that allows us to use their computer equipment or other support. An example would be a partnership with a library to use a site for AARP Foundation Tax-Aide on a day when the library is not open.
- To grow the AARP Foundation Tax-Aide customer base. An example would be a coalition of organizations who are interested in increasing Earned Income Tax Credit (EITC) benefits.
- To pursue coalitions for recruitment of customers and volunteers that may bring diversity as it relates to race, gender, and age. An example would be a coalition of groups such as La Raza, Asian-American Society, etc. to publicize volunteer opportunities with AARP Foundation Tax-Aide.

Partnering with other organizations in a coalition or similar endeavor can require a sizable investment of volunteer effort and time. It is therefore recommended that AARP Foundation Tax-Aide leaders consider the potential for positive outcome when deciding whether to join the effort. The AARP Foundation Tax-Aide program should benefit in some way such as getting new volunteers, getting the counts for the taxpayers helped, receiving computers or other tangible resources and/or have the inclination and time for networking to possibly acquire other needed program resources.

<u>Why would another organization want to partner with AARP Foundation Tax-Aide?</u>
How Partnerships and Coalitions can benefit from AARP Foundation Tax-Aide:

- AARP Foundation Tax-Aide can bring expertise because it is the largest free, volunteer run tax assistance and preparation service with 42 years of experience.
- AARP Foundation Tax-Aide has a presence in nearly 6,500 sites across the country—therefore; AARP Foundation Tax-Aide brings an existing infrastructure.
- AARP Foundation Tax-Aide has the largest rural infrastructure experience, absent in many coalition groups.
- AARP Foundation Tax-Aide has a train-the-trainer model that can assist other groups.

What Benefits a Corporation Can Receive by Donating to a 501 (c) (3):
A corporation's charitable deduction cannot exceed 10 percent of its taxable income, computed without taking certain specified deductions or any net operating loss carry back [I.R.C. Section 170 (b) (2)]. The law permits a five-year carryover of contributions in excess of this 10 percent limit [Section 170 (d) (2)].

In general a corporation may deduct gifts made to the same types of entities and organizations which qualify for an individual's charitable deduction, with some exceptions. These entities include a trust, community chest, fund or foundation *, a corporation, or a state, which is organized and operated exclusively for religious, charitable, scientific, literary or educational purposes or to foster amateur sports competition or for prevention of cruelty to children or animals.

*AARP Foundation Tax-Aide is offered in conjunction with the IRS. Contributions are generally deductible but potential corporate donors should first check with the IRS or their tax advisor.

Finding Potential Partners for your Program

Be creative when you think about with whom to partner at your state level or district levels. Any store, business, organization, non-profit, or government entity may have something to offer!

The Better Business Bureau, Regional Book of Lists, and Chamber of Commerce membership rosters can provide comprehensive listings of potential partner targets in your region or state. A web search can direct you to business and organization reference materials and lists helpful in identifying targets and developing proposals. You can also use the internet to research potential partners. For example, when you use www.google.com, and type in "accounting firms" a number of suggested URLs are available for you to access. The following are examples of potential partners in your area.

Corporate World

- Corporations
- Major employers in your state, region, and local communities
- Insurance agents, accounting firms, lawyers, real estate companies
- Newspaper and community magazine sales reps
- The weekly shopper publications
- Radio stations and billboard companies
- Producers of seniors programming at your local cable and network affiliates
- Retail store managers, the market where you shop, businesses you patronize
- Shops that may support local "Little League" teams
- Appliance, office supply, and computer stores
- The manager of your bank branch and/or the Community Relations representative for the major banking institutions

Non-Profit

- Local union
- Credit Unions
- Kiwanis, Rotary, Masons, the Junior League, and similar community service organizations
- Community Foundations
- Churches and places of worship

Government

- Schools, Community Colleges, Universities
- State Department on Aging and other Government Agencies such as Recreation, Housing Opportunities Commission Offices, etc.

How to Contact a Potential Partner

- Write a letter (Appendix D)
- Telephone a contact
- Network—go to meetings, dinners, churches, synagogues, etc. If there is an event, often someone (possibly the AARP State Office) is buying a table and has an open seat that needs to be filled. Be that person!
- Become a speaker at Kiwanis, Rotary, and other service club meetings. Captivating this audience with the success and benefits of AARP Foundation Tax-Aide programs in your state may yield valuable resources.
- Connect with your AARP Associate State Director to discuss potential sponsors and related program needs.

What Potential Partner can provide:
Equipment

- Donations of computers and printers
- Machine maintenance and repair
- Storage of machines and equipment during and between seasons
- Telephone lines
- LCD Projectors
- Sharing *the partner's* computers

Volunteers

- Time of a staff person to assist with tax preparation, help organize or make appointments
- Many corporations, businesses and community groups operate community participation programs. Ask to include AARP Foundation Tax-Aide in their volunteer opportunities section
- Community groups and business partners may sponsor recognition events for volunteers

Sites

- Convenient locations that customers might frequent such as stores, coffee shops, and banks
- Meeting rooms
- Training rooms for tax preparation
- Free storage space for computers when not in use
- Use of their computers

Supplies

- Coffee cups and site refreshments
- Giveaways for customers and volunteers such as refrigerator magnets, calculators, and key chains
- Refreshments for end-of-year meetings
- Paper and duplication services
- Computer paper and printer cartridges
- Pencils, pens, and paper pads

Promotions and Advertising

- Free advertising, promotional space
- Publicity about AARP Foundation Tax-Aide program benefits and volunteer opportunities
- Feature article space in company or organizational newsletters
- Free advertising space in business, company and community newsletters, real estate and investment broker publications to advertise for volunteers
- Postings at senior and community centers to promote the program during the tax season and to advertise volunteer opportunities
- Free Public Service Announcement (PSA) from radio stations and billboard companies
- Distribution of promotional materials on the AARP Foundation Tax-Aide program and volunteer opportunities at partner sites and office locations
- Ask to sit at your partner's table at an event

Financial Donations

- Monetary donation to AARP Foundation Tax-Aide (note that this is not fee-for-service provided, but a contribution to a good program)
- Foundation or grant monies and/or equipment

Memorandum of Understanding (MOU)

A Memorandum of Understanding (MOU) should be prepared whenever there is an agreement with a partner or coalition that requires AARP Foundation Tax-Aide program (at the state level) and/or the other partner(s) to provide a substantial benefit to the partnership or coalition. The benefit that is provided might be any of the items noted above, such as equipment, publicity, funds, or supplies.

The National Office has prepared a template for an MOU which will help you to prepare the document (see Attachment _____). Once the MOU draft is prepared, you should forward the original to the National Office for review and signature. **Note that volunteers should not sign an MOU on behalf of AARP Foundation Tax-Aide.**

The purpose of the MOU is to provide written evidence of the agreement in the event that there is later a disagreement as to whether or not the benefit has been provided. Not all partnerships will require an MOU—you will need to use your common sense as to when to prepare an MOU, but the National Office staff is always available to talk the question through with you.

Here are some examples to help you decide if an MOU is required:

- The local church agrees to let you start a site at their church.   NO MOU is required.
- The local church agrees to let you start a site at their church, but wants you agree that you will clean the site up, and replace toilet paper and other minor supplies. NO MOU is probably needed, but check with the National Office if you have questions.
- The local church agrees to let you start a site at their church, and wants you to agree that in return for using their computers your volunteers will set up a computer network and repair other computers. Volunteers should not agree to this arrangement unless there is an MOU approved by the National Office.

Section Three: Non Grant Solicitations

Local Sponsorships:

Local Sponsorships may be pursued by states who would like to build their donated funds account and increase the amount they can spend on the purchase of equipment, materials and volunteer support. The expenditures from this initiative will be largely managed and directed by the State Coordinator with an objective of dramatically increasing the funds available for local discretionary spending. The focus is on obtaining local sponsorships from businesses and individuals in the local community. Program materials, sponsorship packages and training are available to volunteers who would like to have a way of increasing donations from businesses and individuals with the opportunity of being a local site sponsor.   Businesses will benefit from the program by dramatically increasing their visibility in the community at a relatively low cost, by being seen as involved in their community and through recognition items built into the packages. The local AARP Foundation Tax-Aide program will benefit by an increase in donated funds and possible promotion of the AARP Foundation Tax-Aide program by the business.

Funds that are obtained will become a part of the state's donated funds account which can be utilized in the AARP Foundation Tax-Aide program by the state at the State Coordinator's discretion.

Local Sponsorship Project Key Components:

- Participation is optional and determined by interest of SC and PCS.
- Training provided to SCs and PCSs via webinars and printed materials on the Extranet.
- Kit and presentation book to walk AARP Foundation Tax-Aide volunteers through how a business or individual can become a local sponsor available on the Extranet
- Packages should include required donation amounts for each sponsorship option and recognition pieces provided by AARP Foundation Tax-Aide. All Sponsorship agreements should be reviewed and signed by the National Office staff.

The Partner Proposal Presentation

Cultivating partnerships, donations, and similar sponsorships is challenging. Many other deserving organizations are soliciting support for other important programs. The market is competitive. Prepare well in order to make the most credible presentation possible and ensure your solicitation success.

There are two methods to gain the support you desire from a potential partner.

1. The informal presentation or letter
2. The more formal grant process

If the partner has a solicitation process, then it will automatically be a formal grant and you will need to get the solicitation and any guides they have for their grant writing. If a potential partner requires a proposal which is limited to no more than three pages you must stay within those guidelines and not submit any more than three pages.

Potential Partner solicitation

- Extend an invitation to the potential partner for coffee or a visit with you at the site
- Make an appointment even for a telephone conversation; this ensures uninterrupted attention to your conversation
- Schedule a formal meeting to present your partner proposal in person
- Initiate the meeting environment you feel will best appeal to your potential partner. Give the partner a chance to receive your message with full attention in his/her busy work schedule
- This may be all you need to get small donations such as loaned equipment, and location to have a site, or donated supplies.

Formal presentation package

Prepare a Partner Proposal Presentation Package

Develop a letter of introduction, a proposal sheet detailing the resources you are requesting and the benefits your partner will receive. Also include background facts on the AARP Foundation Tax-Aide Program and a brochure about AARP Foundation Tax-Aide.

- Write about the AARP Foundation Tax-Aide program and the customers you serve in your state. Reference AARP Foundation Tax-Aide credentials in the years of service, numbers of people we serve, and numbers of volunteers to establish credibility.
- Have in mind a recommendation of what makes the best sense for the partner to donate.
- Be specific about what you are requesting. Be ready to adjust your request given budget constraints. Know your material. For example, if you are asking for computers, be accurate with the specifications. Also know the facts about AARP Foundation Tax-Aide.
- Be comfortable with what you wish to present; be fluent on your topic and the program. Review your background material in advance.
- Remind each partner of the tax benefits and goodwill they may receive by supporting AARP Foundation Tax-Aide efforts.

A Partnership Folder

You may wish to prepare a folder for the potential partner. This should include items that inform the partner about AARP Foundation Tax-Aide.

Use AARP folder - D 12556

Consider putting in the folder:

- An English recruitment brochure D141
- A Spanish recruitment brochure D 17222
- English Fact Sheet D12609
- Spanish Fact Sheet D18159
- An English "Get Free Help Brochure" D13401
- A Spanish "Get Free Help Brochure" D16719
- Your business card

Be prepared to discuss benefits to the partner

Each partner should benefit. Prepare for give and take. Many times this part takes considerable time and diligence. Sometimes you may be asked to submit a grant (see next section) or to provide more information. Make sure that you convince the partner why this will be beneficial for the partner. Some things may not be negotiable.

After submitting your request

- Follow up with your partner contact to confirm details, answer questions, and finalize your program with your partner. Here you must do a balancing act, be very careful not to become a pest, but also do not be forgotten. This is probably the hardest part of this process. This is your relationship with your potential partner, learn to listen and follow their lead.

If you were granted your request:

- Celebrate - putting a partnership together is hard work!
- Make timely arrangements to pick up donations.
- Make sure to send a Thank You (Appendix E) letter to acknowledge donations.
- Promote the AARP Foundation Tax-Aide program to increase awareness among potential partners of the value of AARP Foundation Tax-Aide programs in their community.
- Recognize partners as appropriate, in flyers, table cards, and announcements.
- Produce public relations releases to announce partnerships and thus encourage additional relationships and collaborations. Assistance is available from the national office. (Appendix F)
- Display a "thank-you to our partner" poster on a flip-chart sign at your sites.

If you were *not* granted your request:

Good try. Review your package and request and make any corrections. Don't give up! Review any feedback from potential partner to further refine your search. Also, do an internal review to see what you feel could have gone better and start again. If you have concerns or questions talk to the national office and be up front with them. They may be able, as a third party, to offer helpful advice or even provide some help.

Employee/Retiree Employer Programs

Many companies have programs where donations are made, by the company, to charitable organizations where an employee or retiree of the company volunteers. Encourage volunteers to contact their current or former employers about such programs. Some of these programs have a requirement of a number of volunteer hours to be completed by the individual before a donation is made. The company may also have a limit on the amount given to any one charitable organization per year.

Section Four: Grant Writing

***Note:* All grants requesting funding over $5,000 must be reviewed by the National Office Staff prior to submission. Grants under $5,000 do not have to be reviewed but if you wish a consultation, you can send it to Marcy Gouge, Assistant National Director for review to mgouge@AARP.ORG, Fax 202-434-6026 or mail to AARP Foundation Tax-Aide, 601 E Street, NW, Washington, DC 20049. (This is important for AARP Foundation/AARP Foundation Tax-Aide from a coordination and legal standpoint.) Before a grant or resource commitment is made, the SC and RC should formally be made aware of the commitment and requirements.**

A grant is a monetary award by a funder provided to eligible organizations to carry out activities that are consistent with the objectives of the granting program. Grant funds do not have to be paid back if the funds are properly used to implement the program for which the funds were provided. The grant is usually a formal proposal required by the grantor of funds with specific guidelines that you must follow. Most grantors publish a synopsis of the types and amounts that they are willing to grant. If the grant is for education for young children then it is not likely that AARP Foundation Tax-Aide has much of a chance to realistically participate. But many organizations have community service grants and focus on help for the elderly. Look at the requirements and decide if you feel your request would clearly fit into the grantors requirements. .

- Research to find out who offers monies or donations. This can be done in the library, networking, or searching the web.
- Discuss your ideas with your SMT.
- Once you have determined that you feel the opportunity is valid then find out if the grantor has a proposal guide or a submittal format. If they do have a required form, then use it or do not waste the time to put together the proposal
- If there is no proposal guide, then write a letter of inquiry and send to the grantor.

Letter of Inquiry
There are **two** main components to the letter of inquiry. Both should be written on organization letterhead and addressed to the appropriate foundation program officer.

Cover Letter - no more than two paragraphs

- Your organization and its purpose
- Purpose of project in terms of benefit to constituents
- Make the letter interesting
- Three prong money request
    1. total budget
    2. how much money you have
    3. how much money you need
- Strong commitment from AARP staff
- End actively -“I, or my designee (name) will call within three weeks to see if you have any questions”
- Coordinated by the SC and RC

Letter of Inquiry- 2-4 pages long (to be reviewed by SC and RC prior to submission)
Include the following:

1. Summary statement of request, including budget request
2. Introduction, including information about organization
3. Problem statement telling what you need and why
4. Program objectives telling what you would accomplish with their help
5. Summary of methods telling how you will accomplish your objectives
6. Statement as to how you will evaluate your level of success
7. Statement as to how you will find future funding

Letter of inquiry for equipment (2-3 pages)

1. Write about why the program needs the equipment (why e-filing is so important.)
2. Explain what equipment you will purchase
3. Give three bids and the one you would choose and why
4. State the funds you already have
5. State the specific request of the donor

(Note: Cover letter plus letter of inquiry should be 3-5 pages maximum)

Proposal guidelines

- Be positive
- Avoid jargon and acronyms
- Be concise
- Follow directions

Keep in mind, Grantors will give money because:

- The problem is significant
- You have established credibility (use AARP Foundation Tax-Aide's statistics and mission)
- You are organized
- You are knowledgeable and credible

Sample Description of Program that can be used (Appendix G contains a sample proposal for a partnership that can be adopted to your needs.)

AARP Foundation Tax-Aide is a free, volunteer-run, tax assistance and preparation service available to taxpayers at low- and moderate- income levels, with special attention given to people age 60 and over. AARP Foundation Tax-Aide is a program of the AARP Foundation, offered in conjunction with the Internal Revenue Service (IRS). Over 35,000 AARP Foundation Tax-Aide volunteers trained in cooperation with the IRS helped over 2.5 million taxpayers file their federal and state tax returns last year.

The AARP Foundation is AARP's affiliated charity. Foundation programs provide security, protection and empowerment for older persons in need. Low-income older workers receive the job training and placement they need to rejoin the workforce. Free tax assistance and preparation is provided for low and moderate income individuals, with special attention to those 60 and older. The Foundation's litigation staff protects the legal rights of older Americans in critical health, long-term care, consumer and employment situations. Additional programs provide information, education and services to ensure that people over 50 lead lives of independence, dignity and purpose. Foundation programs are funded by grants, tax-deductible contributions and AARP.

Section Five: Working with your AARP State Office

Each AARP State Office should have a point of contact to support and work with AARP Foundation Tax-Aide. In addition, each state office has a professional communications person who usually has very good contacts with the state press and other media outlets. This resource can be a wealth of help in getting your program publicized as well as other matters:

- AARP Chapters can be a source of volunteers
- State Office can be a source of supplies and administrative support
- Each State Office maintains a web page and can include AARP Foundation Tax-Aide program publicity and/or links to the AARP Foundation Tax-Aide web page.

Go introduce yourself! This is the best first step. Call and make an appointment and see how you can work together. Your State Coordinator should be able to indicate with whom you should first meet and be sure to keep the State Coordinator informed of your activities with the state office to prevent double or conflicting requests.

Different AARP State Offices have provided AARP Foundation Tax-Aide assistance in a variety of ways including:

- Helping find new site sponsors and recruitment sources in an area such as a large city to expand service particularly to diverse customers
- Paying for a recruitment letter for Counselors and/or leaders to AARP members from the database "Insights"
- Assisting in paying for recruitment/promotion ads
- Supplying name badges, t-shirts, trinkets, and other things that volunteers might like
- Opening up an AARP Foundation Tax-Aide site at the office
- Assisting in writing and sending out press releases for program promotion
- Allowing office to be used for meetings, copying, and other such activities
- Providing funds for end-of-the-season volunteer recognition meetings or inclusion of AARP Foundation Tax-Aide volunteers in their volunteer recognition activities.

Section Six: Partnership Checklist

As a summary of the partnership section, you will find a summary checklist for the partnership part of your job.

Consult with your SMT to identify needs. This will help you identify partners.

Identify and Research your Potential Partner

- Visit your local library to consult area business lists and descriptions
- Use the Internet for additional research.
- Consult business and organization listings, chamber of commerce membership directory
- Identify colleagues, friends, business contacts
- Consult with your AARP State Director (or designated liaison) for “leads”
- Prioritize a list of potential partners
- Research potential partners to understand their business environment
- Research the proper contacts, their title, address, and contact information
- Develop background notes on the partner’s business environment

Prepare your Partner Presentation

- Develop a Partner Proposal
- Detail the donations you are requesting
- Describe how this donation will benefit the AARP Foundation Tax-Aide program
- Specify the benefits your sponsor will receive as an AARP Foundation Tax-Aide partner
- Collect the AARP Foundation Tax-Aide promotional materials needed for your presentation
- Tell how it will benefit your community
- Ensure SC and RC are aware of the effort

Present your Partner Proposal

- Call to arrange a meeting or conference call
- Present your Partner Proposal
- If the partner is uninterested in your primary request, discuss ranges of sponsorship opportunities as one of many may interest the partner. For example, if you ask a local McDonald’s franchise to donate funds and they are unwilling to do so, ask if they would be able to provide coupons for volunteers to have lunch while they prepare taxes.

Prepare to Negotiate

- Know the benefits for the partner
- Know your absolute needs as well as those that can be traded

Follow-up your Partner Presentation

- Call to thank your partner for their generous donation
- Follow-up with partner to arrange delivery; confirm donation details
- Prepare the appropriate AARP Foundation donations policy paperwork
- Develop the promotion and press release acknowledgment of your partner
- Confirm acknowledgment approvals from your partner

- Write a formal thank-you letter to your partner.

Let us know about your success!! Notify your Assistant National Director when you negotiate a successful partnership so that your experiences can be shared with other states to encourage and support their efforts to build successful partnerships.

Section Seven: Communications

Media Outreach

A major part of the Partnership and Communications Specialist's (PCS) job is using local media to spread the word about volunteer recruitment in early fall (September and October) and program promotion in the winter (February through mid-April). To be successful, it is important to make use of all local media outlets, including print, radio, TV and online. Getting started can be broken down into three phases:

- Creating a Media Plan
- Targeting the Right Media
- Executing Effective Media Tactics

The end of this section offers tip sheets for working with journalists and various news media.

Creating a Media Plan

What is a media plan?
A media plan is a roadmap that will help you get your message out strategically to media in your state. If you are replacing an existing PCS, you may have an existing media plan that you can replicate or build from. Whether carrying on from someone else's work or starting from scratch, a media plan will guide your work and ensure you meet your communications goals.

What does a media plan look like?
Though media plans often vary, following is an outline that will help you create a basic media plan:

- **Goal** - For example, "to recruit new volunteers and volunteers into the AARP Foundation Tax-Aide program."
- **Objectives -** For example, "Secure media placements to promote AARP Foundation Tax-Aide volunteers and the need for additional help in 2011."
- **Audience -** Who do you want to take action, whether it is a potential volunteer or client?
- **Strategies –** For example, "outreach to print media outlets."
- **Tactics –** see Media Outreach Tactics, below.
- **Measures of Success –** How will you judge whether you've met your goal?

How can I get started?
Meeting with the State Management Team (SMT) , District Coordinators (DCs), Local Coordinators (LCs), Communications Coordinators (CCs) and other relevant volunteers is a useful way to discover what kind of media outreach has occurred in the past. Many DCs are very effective at promoting their program, and you can include strategies that have been successful in your media plan. The SMT, DCs and LCs also can tell you where they have had problems getting coverage and what media outlets they think are worth pursuing.

You also should meet with the Associate State Director – Communications in your AARP State Office to review and provide input to the media outreach plan.

Targeting the Right Media

To communicate your messages to media in a way that will resonate, it is important to make sure you are targeting the right reporters, editors and/or producers at each media outlet. A media list is vital to your ongoing media outreach, and can be added to and updated as you create relationships with local reporters. Following is a list of what positions might be targeted at which outlets:

Print/Online/Wire Services

Metro/City Editor/Bureau Chief

- Oversees the day-to-day local news operation. The city editor, and at larger papers, his assistant city editors, assign stories to reporters and decide which events will be covered. Send local press releases to this person.

Features Editor

- Assigns stories other than hard news. A feature story might be a profile of an interesting person in your program or a unique service the program provides. Contact this person with feature story ideas.

Other Section Editors

- Newspapers in larger cities have editors over different sections such as local government, state issues, national issues, features, medical, etc.
- Call your local paper for a list of these editors. Decide which editor should receive your story. Send press releases to editor. (Keep updating the names on your media list. Staff turnover can be high.)

Editorial Page Editor

- Oversees the editorial section and commentary section. Writes and selects editorials and opinion pieces. Call this person to set up an editorial board meeting (see Media Outreach Tactics)**.**

OP ED Page Editor

- Handles opinion pieces. Send Op-eds to this person.

Reporters

- Research and write stories.
- Reporters may be assigned to specific “beats,” such as health, education, city hall, etc.
- Send your press releases to the reporter who covers that subject matter (beat).

Radio/Television Outlets

News Director
- In charge of the day-to-day news operation. Send press releases to this person.

Assignment Editor
- Assigns stories to reporters and is always looking for story ideas. Address press releases to this person.

Reporter
- Does most interviewing over the phone, recording comments at the radio station.

Talk Show Host
- Hosts radio talk show. Interviews guests and takes comments from callers.

Producer
- Decides with other staff what topics to cover.
- Send information on topics and suggested guests to this person.
- You can also send press releases to this person. Important to tell both producer and assignment editor if you have sent them the same release.
- Develop a relationship with producer. If a topic surrounding your organization or cause comes up, the radio station will call you for an expert on the issue.

Executing Effective Media Tactics
A handful of tried-and-true tactics can help you execute your media plan to ensure you meet your goals and objectives. Though not all the tactics below will work for every situation, they offer a basic starting point.

Tactic 1: Media Advisories
Media Advisories are used as an invitation for media to attend/cover an event**.** Send a media advisory if an event:

- Is compelling/human interest
- Has importance to the community
- Involves people in the community
- Has immediacy. Old news is stale news
- Tie-ins with other current local, state or national events
- Provides unusual or important information
- Is visual or has a visual element

Mail or fax your advisory four to seven days prior to the event so that assignment editors and editors can put your event on the schedule. Call to check whether the assignment editor or editor will run your event in calendars and news briefs prior to the event. Do not call to announce that you are sending a fax.

When preparing a media advisory remember the following:

- Use organization letterhead or plain white paper.
- Name of contact person and phone number should be listed at the top right hand corner. Always let the reporter know how to reach the contact person quickly.
- Top left hand corner write “MEDIA ADVISORY” followed by the date.
- Put the Who, What, When, Where and Why in simple sentences in the first paragraph.
- Write clearly and in a straightforward style. Check spelling, grammar, and punctuation carefully.

Tactic 2: Press Releases
Many news organizations get hundreds of press releases every day. Press releases lacking newsworthy information could end up in the trash and media may not pay attention to the next release you send**.** When possible, it is always best to establish a working relationship with the appropriate person on staff. AARP Foundation Tax-Aide has a selection of press releases that you can personalize for your area. (Appendix H Sample Press Releases) E-mail or fax your press release at least one week prior to the event so that assignment and/or section editors can put your event on the schedule. Call a few days before the event to see if the assignment or section editor is interested in covering it.

Remember, media outlets publish your press release when there is a tie to the community they serve. So, this is a good place to include testimonials or recognize a particularly interesting volunteer. Assess the news value of your activity. Just because it’s important to you doesn’t mean the media will be interested. Unless you have a popular topic or a well-known person speaking, the information might not be published.

Send a press release if your topic or event:
- Is compelling/human interest
- Can be personalized with an example
- Has importance to the community
- Involves people in the community
- Has immediacy - old news is stale news
- Tie-ins with other current local, state or national events
- Provides unusual or important information
- Holds up under scrutiny, has facts to back it up
- Is visual or has a visual element

Some tips for writing a winning press release:
- The name of contact person and phone number should be at the top right hand corner (see sample in Appendix H). If the media can’t contact someone quickly, you could miss an opportunity.
- Keep releases short, two double-spaced pages at most.
- Use organization letterhead or plain white paper.
- Top left hand corner write “FOR IMMEDIATE RELEASE” followed by the date.
- Include an attention-grabbing, newsy headline, or a theme, at the top.
- Before first sentence, begin press release with local dateline, which is the “City, State.”
- The first sentence of any press release is crucial. It must have impact. If the release grabs the editors’ interest in the first paragraph, it is very likely they will keep reading the rest of the release.
- Put the Who, What, When, Where and Why in simple sentences in the first paragraph.
- Put the most important information at the beginning with following paragraphs in order of declining importance.

- When using a quote, make it dynamic and pertinent. Paragraphs that follow should amplify, support and explain subject.
- Write clearly and in a straightforward style. Check spelling, grammar, and punctuation carefully.
- Number pages except the first. Write "—more—"at the bottom of all pages except the last. At the bottom of the last page, put # # # # to indicate the end of the release.
- Include the AARP Foundation boilerplate at the end of each press release, letters to the editor, op-eds, etc.:
    - The AARP Foundation is AARP's affiliated charity. Foundation programs provide security protection and empowerment for older persons in need. Low-income older workers receive the job training and placement they need to re-join the workforce. Free tax preparation is provided for low- and moderate-income individuals, with special attention to those 60 and older. The Foundation's litigation staff protects the legal rights of older Americans in critical health, long-term care, consumer and employment situations. Additional programs provide information, education and services to ensure that people over 50 lead lives of independence, dignity and purpose. Foundation programs are funded by grants, tax-deductible contributions and AARP. For more information about the AARP Foundation, please log on to www.aarp.org/foundation.

Tactic 3: Testimonials

Customer, volunteer, and site testimonials can be an effective way to promote the AARP Foundation Tax-Aide program by highlighting personal satisfaction with the program as part of the message.

Local media love stories about members of their own community, so a testimonial from a real volunteer or client will greatly increase your story's news value. Below are sample testimonials, which could be included in press releases or outreach to media as an example of the sort of stories that are available to them.

Customer Testimonials:

- "I am an older citizen, and I had the advantage of being helped with my income tax by one of your volunteers at the Senior Center. He was courteous, careful, and very helpful. It was a good meeting. Thank you for your help"
- "I just had my taxes done by an AARP Foundation Tax-Aide volunteer at the public library. She was very nice, explained everything, checked on everything and helped me with all of my forms. The supervisor was also very nice, friendly and knowledgeable
- "The gentleman that helped at me at the mall was amazing. He took so much time with me and made sure he prepared my tax return correctly."

Volunteer Testimonial:

- "I found my work as a volunteer tax preparer fulfilling because of the immediate and generous expressions of appreciation I received from the clients with whom I worked. There seems to be a universal feeling of relief and joy when one has in hand a completed tax return."
- "The work as an AARP Foundation Tax-Aide volunteer was good because of the training I received and the community of support I had. I found the examination challenging, but I passed, thanks to the excellent training I received."

Site Testimonials:

- "This year we opened our grocery store to host an AARP Foundation Tax-Aide site. Besides bringing in new customers, we found that our shoppers really appreciated the service you provide. Working with the volunteers has been a real pleasure - such dedication."

- "Our library has housed many different programs, but AARP Foundation Tax-Aide truly is wonderful. Our patrons can look for books while they wait for their tax preparation time. And the professionalism of the volunteers is exemplary."

Tactic 4: Op-Eds/Letters to the Editor

Op-eds and letters to the editor are a great way to bring fresh, compelling commentary to a news outlet. In a newspaper, op-eds run *opposite* the *editorial* page – thus the name op-eds – and are generally written by outside contributors. These contributors might be experts on a certain issue or topic; local leaders; or even community members interested in voicing their opinion on a particular problem or issue. Some tips for writing op-eds:

- Think 10 days ahead: reach out to your local editorial page editor to see what's on deck and tell him/her what you would like to write about. An outside news hook, like a city council vote or policy debate, can create a more compelling pitch.
- Some editors will ask you to send the full op-ed before they will consider publishing it, but others will talk with you about what you are working on. Regardless, be ready to pitch your idea in 60 to 90 seconds.
- Always add value to your argument – for example, why is AARP Foundation Tax-Aide even more important this year, to this town or to a certain group of people?
- Keep your piece between 500 and 650 words.
- Be accurate. Emphasize facts to prove your point and be ready to back them up.

Letters to the editor can be written in response to an article that runs in a print or online publication, or to bring attention to an issue or event in a particular community. Some tips for writing letters to the editor:

- Be brief. Letters to the editor should be 250 words or less. The shorter your letter, the better your chances of getting important points printed.
- Open the letter with a thought-provoking or interesting sentence to entice the reader.
- Be concise and to the point. Use simple language and no jargon. Remember you are writing for a general audience. Show emotion, compassion or wit in the letter. Dry and boring letters don't get printed. Don't be afraid to use personal experiences.
- Be accurate. Emphasize one or two facts in the letter to prove your point. Be ready to back them up.
- If writing a letter in response to an already published editorial or letter to the editor, refer to the article about which you are writing. Sign your letter and include your address and phone number. Only your name and town will be published.

- Call the newspaper and ask who to address it to and where to send your "Letter to the Editor."
- If someone has written an article with factual errors, point out the errors and provide accurate information. Do not attack the writer.

Tactic 5: Editorial Board Meetings
An editorial board meeting is a great way to offer your expertise and help influence the opinion on the editorial page. This meeting usually involves the editorial page editor and some of the editorial page staff writers. Editorial board meetings are a great opportunity for the head of an organization, an expert in the field or an active member of the community to talk to the editorial page writers.

Start by calling the editorial page editor to ask about setting up a meeting. Be prepared in 60 to 90 seconds to explain what you or the person you are representing would like to talk about and why it's important to the community. Give the editorial page editor at least one month to three weeks notice before the desired meeting time. Editorial board meetings book up quickly.

Before asking for a meeting, make sure you can offer information that is newsworthy:

- Timely and relevant to current issues in the news
- Affects the community
- Adds another element, new perspective or information

Be prepared when you go into the meeting: No questions are off limits. Editorial writers know their stuff. If you have an opposing viewpoint, be prepared to answer some tough questions and present your viewpoint clearly and concisely. Supply background information such as facts and figures to prove your point.

After an editorial board meeting takes place, send a thank you note. Remember, editorial board meetings don't always result in a change of opinion, but staff writers will be better educated on a different viewpoint and that's very important.

Tips for Working with Journalists

- Send press releases to reporters who cover issues related to your cause or organization.
- If possible, pitch different angles of the story to the appropriate editor and/or reporters who cover that particular subject matter. Be ready to pitch your story in 60 to 90 seconds; time is precious.
- Tell editors and reporters what they are likely to see at your event. Suggest photo opportunities.
- Email or fax a press release at least one to two weeks before the event. Check for correct spelling of the name of the person to whom you're sending the release. Make sure you have the right mailing address, phone and fax numbers.
- Establish yourself as a source of information. Occasionally suggest ideas that may appeal to reporters but may not necessarily promote your cause.
- If a reporter calls for an interview, return phone call as soon as possible. The sooner, the better, especially within that first hour after receiving the call.
- Many print reporters will do their interviews over the phone. The photo editor may dispatch a photographer to take a photo.
- If a reporter catches you off guard, explain you can't talk right now but will call them back in 15 minutes. Use this time to gather your thoughts. Keep your word and call back at the promised time.
- Don't ever expect to read a story before it is printed. A reporter is under no obligation to show the story before it is printed.
- Ask, "When are your deadlines?" It shows respect for the news organization and is vital information you need to know.
- Begin calls with "Are you on deadline?" If yes, ask for a good time to call back.
- Create a media list. Every editor and reporter you talk to and meet is a great contact for your next news story. Ask for a business card or write down their names and stay in contact. Relationships are crucial.
- Keep in touch, but don't be a pest. If you have the reputation of calling only when you have a newsworthy story, then reporters will more likely return your calls and read your releases.
- When a reporter writes a good story, let them know. Everyone appreciates positive feedback for a job well done.

Working with Print/Online Media

Hints:

- Use an Internet search engine (Google, Yahoo, etc.) and search for newspapers in your state/community. Enter your state + newspapers. A good source is www.usnpl.com.
- Newspapers can devote more time, space and provide more detailed coverage of a story than TV and radio.
- Study and become very familiar with these outlets, noting the different sections and reporters out who might cover your news.
- Deadlines:
  - Online outlets: flexible/as news happens
  - Morning papers: late afternoon
  - Evening papers: late morning
  - Weekly/Bi-Weekly: May have deadlines several days in advance

Tips for a Good Print/Online Interview:

- Expect the interview to be tape-recorded.
- Ask up front "How will this information be used?" and "How do I fit into the type of story you are doing?" "Who else are you interviewing?" Good reporters won't mind telling you.
- Be prepared for either an interview in person or over the phone. Many reporters do phone interviews.
- Return all phone calls. If you fail to return a reporter's call, it may be reported that you had "no comment" or you "refused to return repeated phone calls."
- Don't say "No comment." It looks like you have something to hide. If it is inappropriate for you to answer, explain why. Ex: "It's in litigation," "It's still undecided." Remember, the story will not disappear just because you don't talk.
- Relax and be yourself.
- Know your subject matter. You don't need notes unless it's for dates and times.
- Anticipate questions.
- Answer questions thoughtfully and accurately.
- Beware of "Off the Record." "On and Off the Record" refers to what a reporter can and cannot quote. Do not say things you do not want attributed to you. Only use "Off the Record" if you have an excellent relationship with the reporters and trust them. Remember, reporters can make mistakes.
- Have in mind your key messages and repeat them in the interview.
- Avoid professional buzzwords, jargon and acronyms. They do not translate well to an outside audience. Speak in a language everyone understands.
- Back up your statements with a few key figures and facts to prove what you are saying is true. Reporters must have attribution for information and statistics.
- Give reporter background materials and supporting information.
- Remain focused, listen closely and correct misstatements as soon as possible. If the reporter appears to misunderstand something you say, correct him/her in a courteous and non-threatening manner. Then, restate your position.
- If a reporter forgets to ask a key question, offer the information.
- Don't be afraid to say "I'm not sure, but I can get that information for you." Promise them you will find out the answer and get back to them. Then keep your promise.
- Always tell the truth.
- Never, Never, Never lose your temper. If you do, be prepared to see your anger described in the article.
- Send thank you notes to the reporters for their interest on the issue.

Working With Radio and TV

Hints:

- Working with radio and TV very closely follows the same guidelines as with working with print and online outlets. The biggest difference is the scope of the effort to produce good messages in the radio and television market.
- The opportunity to participate in radio interview shows and TV talk shows at the local level is a very good as these managers are always looking for new and interesting guests. (Appendix I Sample Radio PSA) (Appendix J Sample TV PSA)
- Use an Internet search engine (Google, Yahoo, etc) and perform a search of radio and TV stations within your state. Entering your state + radio and/or television. A good source is www.usnpl.com. A good radio source is www.ontheradio.net/states.
- Radio can respond more quickly in reporting than newspapers and TV.
- Be sure the radio station produces news. Some stations do not accept press releases. Call before sending a release. Some stations just take their news from a national news show.

Tips for a Good Radio/Television Interview:

- Never assume the camera or microphone is off. You can't always tell when the camera is rolling or the microphone is on.
- Know the program. If possible, watch/listen to the show before you appear.
- TV reporters are looking for 15 to 30 second sounds bites – radio stations even less. Use quotable language. Answer with interesting language to grab a viewer's attention, but stay concise so you don't get edited.
- Don't look at the camera. Look at the reporter/interviewer. You never know when a photographer is taping and you always want to appear interested.
- Sound your best. "Uhs" and "Ums" are distracting when talking on camera. Also refrain from making statements like, "You know," and "You know what I mean?"
- Watch nervous mannerisms. Don't tap your foot or rock in your chair. Do gesture naturally.
- Look good: no checked, patterned or striped shirts. Avoid wearing all black or all white. Always be well groomed.
- Ask up front "How will this information be used?" and "How do I fit into the type of story you are doing?" "Who else are you interviewing?" Good reporters won't mind telling you.
- Return all phone calls. If you fail to return a reporter's call, it may be reported that you had "no comment" or you "refused to return repeated phone calls."
- Don't say "No comment." It looks like you have something to hide. If it is inappropriate for you to answer, explain why. Ex: "It's in litigation," "It's still undecided." Remember the story will not disappear just because you don't talk.
- Never be late. Reporters are on tight deadlines.
- Know your subject matter. You don't need notes, unless it's for dates and times.
- Anticipate questions.
- Answer questions thoughtfully and accurately.
- Beware of "Off the Record." "On and Off the Record" refers to what a reporter can and cannot quote. Do not say things you do not want attributed to you. Only use "Off the Record" if you have an excellent relationship with the reporter and trust them. Remember, reporters can make mistakes.

- Avoid professional buzzwords, jargon and acronyms. Be careful of using acronyms for groups within the organization. They do not translate well to an outside audience. Speak in a language everyone understands.
- Back up your statements with a few key figures and facts to prove what you are saying is true. Reporters must have attribution on where their information and statistics come from.
- Give reporter background materials and support information.
- Remain focused, listen closely and correct misstatements as soon as possible. If the reporter appears to misunderstand something you say, correct him/her in a courteous and non-threatening manner. Then, restate your position.
- If a reporter forgets to ask a key question, offer the information.
- Don't be afraid to say "I'm not sure, but I can get that information for you." Promise them you will find out the answer and get back to them. Then keep your promise.
- Always tell the truth.
- Never, Never, Never lose your temper. If you do, be prepared to see your anger described in the article.
- Send thank you notes to the reporters for their interest on the issue.

AARP The Magazine Ink Jet and Program Messages

AARP The Magazine allows messages to be printed in the body of each issue. Messages promote AARP events, encourage attendance at AARP-sponsored forums, and seek volunteers for specific programs.

If you are interested in submitting an ink jet message for your state, please contact your AARP State Office Associate State Director - Communications. Inkjet messages are at the bottom of the President's page in each issue.

Messages must meet specifications. All messages must be no longer than eight lines and 40 characters per line including spaces.

The following ink jet messages previously appeared in *AARP The Magazine* and *AARP Bulletin:*

Promotion Example:

AARP Foundation Tax-Aide is the nation's largest, free, volunteer tax assistance and preparation service. It helps taxpayers with low-and moderate income, with special attention to those 60 and older. From February 1 to April 15 visit www.aarp.org/taxaide or call 1-888-227-7669 to locate a site.
AARP Foundation Tax-Aide is offered in conjunction with the IRS.

Recruitment Example:

AARP Foundation Tax-Aide needs volunteers. There are many kinds of volunteer opportunities – from tax volunteers to greeters as well as communications and technology coordinators. One might be right for you! In the fall of each year, visit us at www.aarp.org/taxaide.or call 1-888-687-2277
AARP Foundation Tax-Aide is offered in conjunction with the IRS.

Guidelines for Social Media, Networking & Communications Platforms

Responsible use of social media platforms is an effective way for AARP Foundation Tax-Aide to engage our targeted audiences and deliver our messages in real time. All of these platforms (Facebook, Twitter, YouTube, AARP.org Online Community, AARP's Blog, etc), despite privacy settings, are essentially public forums with their own etiquette and ethics policies. Please reference the following guidelines for using social networking and social media communications platforms:

AARP-Affiliated Social Media Communications

Communicating on a social media platform on behalf of AARP or an AARP-affiliated project:

1. Be **Transparent:** Always identify your account as affiliated with AARP Foundation Tax-Aide and clearly identify your communications as coming from an AARP Foundation Tax-Aide representative.
2. Be **Responsible**: Do nothing to damage AARP's standing as a nonpartisan, nonprofit organization or otherwise jeopardize AARP's reputation.
3. Be **Non-Partisan**: You may not advocate on behalf of a political candidate or political party on any AARP-affiliated accounts. Do not criticize the IRS or any branch of the government in reference to tax law.
4. Be **Responsive**: Social media is a two-way communications platform. Ensure that you are engaged in a dialogue, not a monologue.
5. Be **Honest**: Respect Copyrights & Confidentiality. Only post things you have permission to post. Make sure you have permission to post any copyrighted (e.g. images, logos) or potentially confidential information.
6. Be **Generous**: Social media is, at its base, social. Share, connect, and provide links to interesting things going on, both in AARP Foundation Tax-Aide and beyond.
7. Be **Interesting**: Share Stories & Best Practices. Collect great stories to tell so that others will know about the important work that AARP Foundation Tax-Aide does.
8. Be **Respectful**: Don't ever give a taxpayer's name, or any other information that could identify a Tax-Aide volunteer or an individual taxpayer.

Section Eight: Publicizing AARP Foundation Tax-Aide at the Local Level

There are numerous ways to publicize AARP Foundation Tax-Aide's recruitment and program promotion needs at the local level by utilizing promotional materials and brochures available through the National Office. This list is not intended to be exhaustive but rather provides some ideas for using the resources available in your community to publicize our service.

- Post program posters, flyers and brochures locally in sites and other heavily-traveled public areas, including grocery stores/pharmacies, malls, and public buildings, as well as in churches, senior centers, libraries, nursing homes, and hospitals.
- Read your local newspapers for times, dates and locations of county fairs, parades, civic celebrations, volunteer drives and social service fairs. Attend and distribute program information or ask to have an AARP Foundation Tax-Aide table available.
- Visit your local senior centers, nursing homes, hospitals and churches and ask them to place AARP Foundation Tax-Aide articles in their newsletters and bulletins.
- Ask your local site sponsors to place AARP Foundation Tax-Aide articles in their newsletters and bulletins.
- Contact your AARP State Director or program liaison to explore how you can work together to publicize AARP Foundation Tax-Aide in conjunction with other AARP programs and services and in AARP publications such as *AARP The Magazine* and *AARP Bulletin*. Make sure program promotional materials are available in your AARP State Office.
- Contact your local AARP Chapter in your area and offer promotional materials and an opportunity to work together to publicize AARP Foundation Tax-Aide during tax season.
- Attend networking events for professionals serving diverse groups and older persons, and ask to speak about AARP Foundation Tax-Aide.
- Contact local care giving organizations and the Area Agency on Aging (http://www.n4a.org/about-n4a/?fa=aaa-title-VI) in your region to inform them about AARP Foundation Tax-Aide and ask if you can participate in various activities (health fairs, social activities, etc.) that they do each year to let seniors know about resources in the community.
- List AARP Foundation Tax-Aide's toll-free number **1-888-AARPNOW (1-888-227-7669)** and web address **(www.aarp.org/taxaide)** in local telephone directories and in community-based service guides.

Section Nine: AARP Key Messages and Talking Points

AARP Foundation Tax-Aide's Key Messages
The official description of the AARP Foundation Tax-Aide program is, "AARP Foundation Tax-Aide is the nation's largest free, volunteer-run tax assistance and preparation service available to taxpayers with low- and moderate-income, with special attention to those age 60 and older."

Please note those words, which have been underlined.

- ***…FREE, VOLUNTEER-RUN…:*** Communicating the fact that our service is FREE and VOLUNTEER-RUN is important. You are providing a crucial service free of charge. The fact that AARP Foundation Tax-Aide is volunteer-run is impressive! Also, as a volunteer, you are covered under the 1997 Volunteer Liability Act which protects all individuals from litigation related to volunteer activities while performing such activities. AARP Foundation Tax-Aide has a 98% accuracy rate on prepared returns, but errors can occur.
- ***… TAXPAYERS WITH LOW- AND MODERATE - INCOME…:*** We serve taxpayers of all ages, races, religions and national origins. We do not establish income thresholds. The only customer who should be turned away from a site is someone whose return calls for tax expertise beyond the scope of AARP Foundation Tax-Aide volunteer's tax training course. The key to growing our program is to continue to recruit and serve diverse populations in terms of age, race, and gender.
- ***…WITH SPECIAL ATTENTION TO THOSE AGE 60 AND OLDER…:*** The IRS Tax Counseling for the Elderly (TCE) grant requires us to list the "age 60 and older" tag line in all promotional materials.
- All AARP Foundation Tax-Aide promotional materials *must* include the program's tagline, **"AARP Foundation Tax-Aide is offered in conjunction with the IRS."**

AARP Foundation Boilerplate
Letters to external audiences, such as letters to the editor, op-eds, and press releases, should contain the AARP Foundation "boilerplate" language listed below.

The AARP Foundation is AARP's affiliated charity. Foundation programs provide security, protection and empowerment for older persons in need. Low-income older workers receive the job training and placement they need to rejoin the workforce. Free tax assistance and preparation is provided for low and moderate income individuals, with special attention to those 60 and older. The Foundation's litigation staff protects the legal rights of older Americans in critical health, long-term care, consumer and employment situations. Additional programs provide information, education and services to ensure that people over 50 lead lives of independence, dignity and purpose. Foundation programs are funded by grants, tax-deductible contributions and AARP.

AARP Foundation Tax-Aide Talking Points

- AARP Foundation Tax-Aide is the nation's largest, free volunteer-run tax assistance and preparation service offered to taxpayers with low- and moderate-income, with special attention to those age 60 and older.
- Program volunteers help people file basic tax return forms, including the 1040EZ, 1040A and 1040. AARP Foundation Tax-Aide is administered by the AARP Foundation.
- In 2011, over 35,000 AARP Foundation Tax-Aide volunteers helped more than 2.5 million taxpayers file their federal, state and local returns.

- AARP Foundation Tax-Aide serves 95% of the people served by the IRS as part of their Tax Counseling for the Elderly (TCE) program.

History of AARP Foundation Tax-Aide

- AARP Foundation Tax-Aide started in 1968 with four volunteers providing tax assistance to older taxpayers in the District of Columbia. Since 1980, the program has operated under a cooperative agreement with the IRS as part of the IRS Tax Counseling for the Elderly program.
- In 1996, AARP Foundation Tax-Aide transferred the federal funds for and the administration of the AARP Foundation Tax-Aide program to the AARP Foundation in accordance with the Lobbying and Disclosure Act of 1995. Currently, AARP Foundation Tax-Aide has nearly 6,100 sites nationwide and over 35,000 volunteers who served more than 2.5 million taxpayers in 2011.

AARP Foundation Tax-Aide in the Community

- AARP Foundation Tax-Aide services are available from February 1 through April 15 each year at nearly 6,100 sites nationwide. AARP Foundation Tax-Aide provides face-to-face assistance at sites across the country located in senior centers, community centers, libraries and other convenient locations.
- AARP Foundation Tax-Aide offers free electronic filing using TaxWise software. In 2011 over 95% of taxpayers assisted through AARP Foundation Tax-Aide had their tax return electronically filed.
- AARP Foundation Tax-Aide provides 24-hour year round Internet tax assistance service at its Web site www.aarp.org/taxaide. Taxpayers can pose questions online and get quality-reviewed answers back within a few business days.

AARP Foundation Tax-Aide Volunteers

AARP Foundation Tax-Aide assistance is provided by over 35,000 volunteer Counselors across the country that are trained, in conjunction with the IRS, to provide assistance in filing basic tax forms.

For information about volunteering, call our toll-free number in the fall of each year at 1-888-OUR AARP (1-888-687-2277) or visit our Web site at www.aarp.org/taxaide.

If you have further questions regarding your position and/or AARP Foundation Tax-Aide, please contact your leadership team.

Frequently Asked Questions are included in Appendix O.

Appendix A: Partnership and Communications Specialist (PCS) Position Description

Program: The AARP Foundation Tax-Aide program provides free personal income tax assistance and tax form preparation to low-and moderate-income taxpayers, with special attention to those age 60 and older.

Purpose of Position: The Partnership and Communications Specialist works with the State Coordinator to implement and maintain partnerships, program publicity and communication activities at the state (split-state) level.

Responsibilities of Position: Supported and guided by the State Coordinator (SC) and by the policies and procedures of the AARP Foundation, AARP Foundation Tax-Aide Policy Manual, the Partnership and Communications Specialist:

- Serves as a member of the State Management Team.
- Identifies with SC, TCS, DC, etc., and others as appropriate, program needs in the state such as:
    - Recruitment-leaders, counselors, and/or increasing volunteer diversity.
    - Sites-accessible, conducive to maintaining taxpayer privacy and/or willing to support e-filing with computers, phone lines, etc.
    - Equipment-free copying, PCs, printers, etc.
- Designs and implements comprehensive state partnership and publicity campaign to address needs.
- Attends initial partnership and communication meetings with State Coordinator and subsequent meetings as needed. Working with District and Communication Coordinators as appropriate, oversees development and implementation of AARP Foundation Tax-Aide Partner Program as it relates to recruitment, program promotion, equipment and/or new sites, as necessary, to ensure that AARP Foundation Tax-Aide honors its side of the partnership.
- Develops a state-level calendar for program publicity activities within the entire state or (sub-state) in partnership with Communications Coordinators.
    - Ensures that all state-level program materials (internal and external) contain boilerplate language.
    - Builds a state (sub-state) file of media contacts, including newspapers, radio and television.
- Maintains a close working relationship with AARP's State Director and Communications Representative, State Communications Coordinator (SCC), where they exist, and other communications staff. Enlists help with program promotion and recruitment while keeping them informed of program publicity activities.
- Provides guidance and support to District/Communications Coordinators in implementing the program in their area of the state.
- Trains District/Communications Coordinator in creating and implementing local level partnership outreach.
    - Identifies needs (volunteers, sites with computers or telephone access, etc.)
    - Identifies potential partners that can help meet those needs.
    - Develops proposal for partner that addresses the partner's anticipated need.
    - Develops plan for implementation and follow-up.
- Guides Coordinators in developing a local/promotion/recruitment activities calendar.
- Trains District/Communications Coordinators in creating and implementing local publicity campaigns.
    - Ensures that all state-level program materials (internal and external) contain boilerplate language.
    - Ensures that sites are identified with proper AARP signage and promotional materials.
    - Builds a local file of media contacts.

Qualifications: The PCS must have the ability to implement and oversee AARP Foundation Tax-Aide partnership(s), publicity and communications efforts in a state (sub-state). Previous experience in public relations, marketing, writing, editing, and working with the media is desirable but not required. Not required to be certified counselor but program knowledge is critical.

Length of Service: The PCS must work effectively with diverse populations and is appointed for a two-year term, contingent upon satisfactory annual review. Mid-cycle appointments are effective to the end of the current cycle and the PCS may be reappointed for subsequent two-year terms.

Eligibility: The PCS is eligible for other AARP or AARP Foundation volunteer positions, but may not hold any other AARP Foundation Tax-Aide State Management Team position.

Time Required**:** The position demands more time from September to March to implement partnership(s) and publicity campaigns to inform the public about our service and recruit volunteers. The exact hours per week depends on responsibilities and size of the specific district.

Training Required: The PCS must acquire the knowledge about their partnership(s) and of publicity needs and all other procedures associated with the program and its volunteers, as well as a basic orientation to AARP, as provided by the National Office.

Travel Required: Travel to meetings concerning partnership development and to state, district and local meetings to communicate publicity goals and promotion training.

Appointment and Supervision: The PCS is appointed by the State Coordinator with concurrence by the Regional Coordinator and reports directly to the State Coordinator.

Supervisor: The PCS reports directly to the State Coordinator.

Scope of Authority: The PCS is responsible for working closely with the District/Communications Coordinators in their state (sub state) to assist in developing a corporate partnership program (AARP Foundation Tax-Aide Partner Program) at the local level and to design an active and comprehensive publicity plan.

Working Relations: The PCS works closely with Assistant National Directors responsible for Partnership and Communications in the National Office, State Management Team, Local/District Communications Coordinators, the AARP State Communications Coordinator (where they exist), AARP State Director and/or communications staff, IRS designated representative, and the media in their state. The AARP State Director will help you identify volunteer and staff counterparts in the state with whom the PCS will want to build a strong working relationship.

Progress Review: The PCS's performance is monitored on an on-going basis and reviewed annually by the State Coordinator.

Available Resources: The PCS will be afforded the necessary guidance, training and materials needed to facilitate leadership responsibilities. Additional support and training are provided from the AARP national and state office staff, National Development Committee, and the State Coordinator. AARP Foundation Tax-Aide reimburses volunteers for covered program related expenses as set out in the *Policy Manual*.

Volunteer Policy: AARP Foundation volunteers will receive equal opportunity and treatment throughout recruitment, appointment, training, and service. There will be no discrimination based on age, disabilities, gender, race, national or ethnic origin, religion, economic status, or sexual orientation.

Appendix B: Communications Coordinator (CC) Position Description

Program: The AARP Foundation Tax-Aide program provides free personal income tax assistance and tax form preparation to low-and moderate-income taxpayers, with special attention to those age 60 and older.

Purpose of Position**:** The Communications Coordinator works with the District and Local Coordinators to implement and maintain partnerships, program publicity and communication activities at the district and local levels.

Responsibilities of Position: Supported by the policies and procedures of the AARP Foundation and the *Policy Manual*, the Communications Coordinator:

- Identifies with the Partnership and Communications Specialist and District Coordinator and others as appropriate, program needs in their district such as:
  - Recruitment-leaders, counselors, and/or increasing volunteer diversity.
  - Sites-accessible, conducive to maintaining taxpayer privacy and/or willing to support e-filing with computers, phone lines, etc.
  - Equipment-free copying, PCs, printers, etc.
- Works with District and Local Coordinators as appropriate, to oversee development and implementation of AARP Foundation Tax-Aide Partner Program in the district as it relates to recruitment, program promotion, equipment and/or new sites, as necessary, and to ensure that AARP Foundation Tax-Aide honors its side of the partnership.
- Ensures that all local-level program materials (internal and external) contain boilerplate language.
- Builds a local file of media contacts, including newspapers, radio and television.

Qualifications: The CC must have the ability to implement and supervise district AARP Foundation Tax-Aide partnership(s), publicity and communications efforts in a geographic region. Previous experience in public relations, marketing, writing, editing, and working with the media is desirable but not required.

Term of Service: The CC is appointed for a one-year term, contingent upon satisfactory annual review, and may be reappointed for subsequent one-year terms.

Eligibility: The CC is eligible for other AARP volunteer positions.

Time Required**:** The position demands more time from September to March to implement partnership(s) and publicity campaigns to inform the public about our service and recruit volunteers. The exact hours per week depends on responsibilities and size of the specific district.

Training Required: The CC must acquire knowledge of the publicity needs and all other procedures associated with the program and its volunteers, as well as a basic orientation to AARP, as provided by the National Office.

Travel Required: Travel should be minimal.

Appointed By: The CC is appointed by the District Coordinator with concurrence by the State Coordinator.

Supervisor: The CC reports directly to the District Coordinator.

Scope of Authority: The CC assists the District Coordinator in all matters concerning partnerships, and publicity for both recruitment and site promotion. The CC may not supervise other volunteers.

Working Relations: The CC works closely with the Local/District Coordinators, Partnership and Communications Specialist, AARP Foundation Tax-Aide volunteer leaders, and AARP leadership as required.

Progress Review: The CC's performance is monitored on an on-going basis and reviewed annually by the District Coordinator.

Available Resources: The CC will be afforded the necessary guidance, training and materials needed to facilitate leadership responsibilities. Additional support and training are provided from AARP national and state office staff, Partnership and Communications Specialist, and the IRS staff. AARP Foundation Tax-Aide reimburses volunteers for covered program related expenses as set out in the *Policy Manual*.

Volunteer Policy: All Foundation volunteers will receive equal opportunity and treatment throughout recruitment, appointment, training, and service. There will be no discrimination based on age, disabilities, gender, race, national or ethnic origin, religion, economic status, or sexual orientation.

Publicity is both a statewide responsibility, but in order to effectively support the program, must also be heavily geared to the local district level market. Most of our states have a few major papers and communications outlets but traditionally Tax Aide has had much better results in the long run from local publicity. This takes the form of local daily, weekly, or monthly newspapers, local radio and TV stations and local newsletters such as the local senior center newsletter. With guidance and assistance from the PCS, the local CC is much better positioned to identify and interface with the local media.

Appendix C: National Partnerships

The national AARP Foundation Tax-Aide staff works to develop national partnerships. This entails the national office doing the initial leg work to establish a partnership on the national level. Many times these partnerships are initiated due to the interest by the partner to participate with the AARP Foundation Tax-Aide program. Also, a successful local partnership program can be moved to the national level and then offered on the local level by a national partnership. National partnerships are usually started with a few pilot sites and then expand further as their successes multiply.

The level of involvement between what is announced and what is available at the local level varies depending on the needs of the local partner and the local AARP Foundation Tax-Aide. If you see a partner that you believe could benefit your state's program then you need to identify yourself to the local point of contact. Many times you will need to introduce the national partnership to the local partner. Discuss the background of the partnership, take information on success stories in other areas, and see if you can develop a local partnership.

Remember, a true partnership is where each side benefits. Ways in which AARP Foundation Tax-Aide program can benefit include acquiring new volunteers, opening new sites and obtaining the counts for the taxpayers helped at those new sites (only if the volunteers have gone through the AARP Foundation Tax-Aide training), and receiving computers or other tangible resources. Contact the AARP Foundation Tax-Aide national office for information and assistance.

Examples of national partnerships that have been formed in the past include relationships with the following organizations:

Veterans Administration Hospitals Association (VAHA)
Veterans of Foreign Wars (VFW) www.vfw.org
Goodwill Industries   www.goodwill.org
Idealist.org   www.idealist.org

IRS Coalitions Summary

IRS coalitions are usually started by a local IRS office which invites a group of possible partners to an initial meeting to explore the feasibility of opening or expanding tax service especially to Earned Income Tax Credit (EITC) eligible clients. At this meeting each potential is asked to present what they can bring to the coalition and what the coalition expects. Please insure that upon participation in this meeting you present that AARP Foundation Tax-Aide needs to gain Counselors and equipment. AARP Foundation Tax-Aide is not just to be a support partner who does training or provides resources.

If the coalition or a member of the coalition, on behalf of the coalition, is an IRS VITA grant recipient be aware before joining the coalition that you will not be able to share the AARP Foundation Tax-Aide site service numbers with the coalition partners for purposes of reporting to the IRS. The IRS grant office has restrictions in place that do not allow multiple grant recipients to report stats for the same site. Per IRS SPEC the service numbers will remain with the sponsoring organization that holds the SIDN and EFIN for that site. AARP Foundation Tax-Aide will not operate or provide support to sites where we do not hold the SIDN and EFIN.

It is very important that if you are joining an IRS coalition that the role and rules of AARP Foundation Tax-Aide are recognized up front by both the IRS and the other coalition partners.

If it is decided to be beneficial for AARP Foundation Tax-Aide to participate in the coalition ensure that all Counselors completing returns under AARP Foundation Tax-Aide meet the training and certification requirements and that the SIDN and EFIN are AARP registered at least for the period that AARP will be manning the site.

The concept of AARP Foundation Tax-Aide Instructors training or Local Coordinators running the site for one or two days to get the site operational is not beneficial to AARP Foundation Tax-Aide and that effort can be done but not reimbursed by AARP Foundation Tax-Aide.

1. Advantages of Participating in the Coalition

a. Access to a new pool of volunteers, site leadership, and computer facilities.
b. AARP Foundation Tax-Aide may serve a more diverse group of taxpayers.
c. AARP Foundation Tax-Aide may meet new contacts that will assist with obtaining computers and other associated equipment.
d. Increase the number of taxpayers served.
e. Access to new sites.

What are the issues that AARP Foundation Tax-Aide will need to handle?

a. Additional effort by Instructors.
b. Mentoring and quality review by existing AARP Foundation Tax-Aide Counselors
c. Commitment of time to engage in coalition meetings by SC, PCS, and/or DC.

Appendix D: Template for Memorandum of Understanding (MOU)

MEMORANDUM OF UNDERSTANDING
BETWEEN: (Name and Address)

AND: AARP Foundation Tax-Aide
Address: 601 E. Street NW Washington DC 20049
Telephone: 202-434-2197 **Fax:** 202-434-6466
Web Address: aarp.org/tax-aide

This Memorandum of Understanding (MOU) contains basic provisions, which will guide the working relationship between both parties. The MOU may be amended in writing, at any time with concurrence of both parties and will be renegotiated at least every three years.

1. <u>Purpose of this Memorandum of Understanding:</u>

2. <u>Activities to be conducted pursuant to this Memorandum of Understanding:</u>

3. <u>Deliverables:</u> Both parties agree and understand that they will be responsible for the following deliverables in order to support this partnership:

   AARP Foundation Tax-Aide:

   (Name of other party):

4. <u>Communication:</u> ______________ will periodically contact AARP Foundation Tax-Aide to discuss needs of the volunteers and the program. AARP Foundation Tax-Aide will notify _____________ of changes in volunteer management personnel and /or position descriptions.

5. <u>Safety:</u> _____________________ will ensure the health and safety of AARP Foundation Tax-Aide volunteers while at the site and will take prompt steps to correct any observed

health or safety problems. The AARP Foundation Tax-Aide volunteers will investigate and report immediately any accidents or injuries involving AARP Foundation Tax-Aide volunteers to the ______________ in the following manner: The initial report can be made by telephone to _____________. A written Incident Form shall follow within 15 days sent to______________________________.

6. Insurance: AARP Foundation Tax-Aide will provide accident and liability insurance to all enrolled AARP Foundation Tax-Aide volunteers.

7. Termination: __________________ may request the termination of the AARP Foundation Tax-Aide program at the site no later than 45 days prior to the opening of the tax site for the tax season. Said request will be in written form, and will be sent to the representative designated herein.

8. Limitations: The AARP Foundation Tax-Aide program will not permit volunteers to participate in or take any actions which are not within policy of the program, and no volunteers will take part in partisan political activity or participate in profit-making activities while at the tax site.

9. Publicity: _______________________ will take reasonable steps to provide publicity about AARP Foundation Tax-Aide services, including but not limited to the posting or distribution of flyers, brochures, and signage at the site. If AARP Foundation Tax-Aide volunteers participate in any media events, whether it is on radio, TV, print or a verbal presentation, reasonable steps will be taken to mention that _________________has provided sites for the program.

10. Compliance: ______________________ agrees to comply with the provisions of the Civil Rights Act of 1964 (Non-discrimination) and Section 504 of the Rehabilitation Act of 1973 as amended (Handicap Accessibility).

11. Other:

Tax Exempt Status:

___________________________ is qualified as tax-exempt with the IRS. Yes / No

Contact Information:

AARP Foundation Tax-Aide Representative and Contact Information:

_______________________Representation and Contact Information:

SIGNATURES AND DATES:

For AARP Foundation Tax-Aide Program

____ Date: __________________________

Marcy Gouge, Assistant National Director

For_______________________________________

____ Date: __________________________

Appendix E: Form Letter of Interest

Date

Name
Foundation Name
Address
City, State Zip

Dear ***Name***,

Thank you for allowing us to submit a letter of interest regarding the AARP Foundation and AARP Foundation Tax-Aide program with your board of directors. I am excited to share with the ***XYZ Foundation*** some of the work that the AARP Foundation is doing in ***XYZ County***.

AARP Foundation Tax-Aide is one of the many programs of the AARP Foundation and is often considered our flagship program. AARP Foundation Tax-Aide is the nation's largest free tax assistance and preparation service available for low- and moderate-income taxpayers, with special attention to those 60 and older. While this is a national program, it is run by local volunteers. These trained and IRS certified volunteers help taxpayers file accurate returns, avoid high tax preparation costs, and receive all of the benefits, credits and deductions to which taxpayers are entitled.

Many low- and moderate-income seniors face several challenges with filing their income taxes: unfamiliarity with and difficulty understanding tax laws and forms; constant changes in tax law; few resources to pay tax preparers; unfamiliarity with e-filing or no opportunity to file returns electronically for quicker refunds; and high interest rates charged on refund anticipation loans. They also face the challenge of learning how to use computers and the Internet to prepare their own taxes. The National Adult Literacy Survey found that 46 to 51 percent of the nation's adult population lacks the most basic skills to prepare a tax return.

Locally, AARP Foundation Tax-Aide program is growing and is making an impact on seniors and others in need in ***XYZ County***. Currently we have ***(insert total number of local sites)*** AARP Foundation Tax-Aide sites. In 2010, ***(insert local numbers)*** e-filed tax returns were prepared by volunteers; this was a ***(insert percentage increase)*** from the previous year. We estimate this will have saved these taxpayers nearly ***(insert appropriate number, $120 x the number of clients served)*** in tax preparation fees had they gone to a for-profit tax preparation service.

Through AARP Foundation Tax-Aide efforts in ***XYZ County***, taxpayers save not only in tax preparation fees, which can be used to cover necessities such as food and medicine, but also AARP Foundation Tax-Aide volunteers help people take advantage of the Earned Income Tax

Credit (EITC). The EITC is a refundable federal income tax credit for low-income working individuals and families. In 2010, through AARP Foundation Tax-Aide ***(insert local number)*** taxpayers in ***XYZ County*** were able to take advantage of the EITC for a savings of ***(insert local number)***.

As you can see our local AARP Foundation Tax-Aide program is quite successful and is growing each year. Our primary need in ***XYZ County*** is to expand our services. Our desire is to open additional sites for the 2011 tax season, recruit and train additional volunteers and to accommodate the growth at the current sites. An additional priority need in opening a new site would be to purchase laptops and other technology equipment for the site to provide e-filing.

Therefore, the AARP Foundation and ***XYZ County's*** AARP Foundation Tax-Aide program respectfully request ***(insert $ amount)*** from the ***XYZ Foundation*** to support tax-preparation service for low- to moderate-income taxpayers, with special attention to those 60 and older in ***XYZ County***; as well as recruitment of volunteers and the opening of an additional site. This funding will advance AARP Foundation Tax-Aide's assistance and expand the electronic filing of tax returns to meet the needs of low- and moderate-income residents locally.

Again, many thanks for your interest in the work the AARP Foundation is doing in ***XYZ County***. We hope that the ***XYZ Foundation*** will join us in our efforts to further our reach to those in need locally. If you or your board members have further questions and would like to discuss further, please feel free to contact me at (insert personal information)

Warmest regards,

Name
Title

CC: National AARP Foundation Tax-Aide Office Contact

Appendix F: Sample thank you letter

Date

Ms. Name
Community Programs Manager
XYZ Corporation
123 East River Road
Cit, State, Zip Code

Dear Ms. Name

Thank you for working with us to acquire the additional laptops for our AARP Foundation Tax-Aide volunteers. We are proud to work with XYZ and the Organization region facility on this program.

As you know, your help in securing laptop computers for our AARP Foundation Tax-Aide program is invaluable. Given the temporary working conditions, portable laptops will allow AARP Foundation Tax-Aide volunteers to provide electronic filing more readily. The ease that the laptops will bring to the volunteers when serving taxpayers during the tax season will be noticed greatly.

I have enclosed a copy of the news release we plan to publish. On behalf of the AARP Foundation Tax-Aide volunteers in the district area, thank you for your generous support of our program. We will certainly enjoy the tax preparation season with the arrival of your new laptops and shall be better equipped to provide this valuable service in our community.

Please do not hesitate to contact me if you have questions.

Thank you for your generous support. AARP Foundation Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

Sincerely,

Name
Partnership and Communications Specialist
AARP Foundation Tax-Aide

Appendix G: Partnership Press Release

AARP FOUNDATION

FOR IMMEDIATE RELEASE
(DATE)

CONTACT:
PHONE NUMBER(S):

AARP FOUNDATION TAX-AIDE PARTNERS WITH YYY IN CLEVELAND

(City/Town, State)---AARP Foundation Tax-Aide announces an exciting partnership with YYY, Inc. of greater Cleveland. YYY will donate 50 laptop computers for use by AARP Foundation Tax-Aide volunteers during the upcoming tax season.

AARP Foundation Tax-Aide is the nation's largest, free, volunteer-run tax assistance and preparation service for low- and moderate-income taxpayers, with special attention to those age 60 and older.

Last year over 36,000 AARP Foundation Tax-Aide volunteers helped over 2.3 million people file their federal, state and local tax returns. The program is offered at nearly 6,700 sites around the country including senior centers, libraries and other convenient locations. Service is also available for homebound individuals, whenever possible.

The YYY laptops will enable AARP Foundation Tax-Aide volunteers to provide free electronic filing (e-filing), the fastest growing method to file tax returns. AARP Foundation Tax-Aide is proud to partner with YYY in the greater Cleveland region on this program.

To donate a computer, printer or additional supplies to the AARP Foundation Tax-Aide program for the upcoming tax season, contact Martin Long (phone number). Your donation is tax-deductible according to applicable law. To locate an AARP Foundation Tax-Aide site near you, call toll-free, 1-888-227-7669 or visit our site at www.aarp.org/taxaide, during the tax season.

AARP Foundation Tax-Aide is a program of the AARP Foundation, offered in cooperation with the IRS.

The AARP Foundation is AARP's affiliated charity. Foundation programs provide security, protection and empowerment for older persons in need. Low-income older workers receive the job training and placement they need to rejoin the workforce. Free tax assistance and preparation is provided for low and moderate income individuals, with special attention to those 60 and older. The Foundation's litigation staff protects the legal rights of older Americans in critical health, long-term care, consumer and employment situations. Additional programs provide information, education and services to ensure that people over 50 lead lives of independence, dignity and purpose. Foundation programs are funded by grants, tax-deductible contributions and AARP.

####

Appendix H: AARP Foundation Tax-Aide Sample Proposal

The AARP Foundation, AARP's affiliated charity, and AARP Foundation Tax-Aide respectfully request ***$XXXX*** from the ***XYZ Foundation*** to support tax-preparation service for low- to moderate-income taxpayers, with special attention to those 60 and older in ***XYZ County***. This funding will advance AARP Foundation Tax-Aide's goal of increasing volunteer capacity and AARP Foundation Tax-Aide assistance and expanding the electronic filing of tax returns to meet the needs of low- and moderate-income residents in ***XYZ County***.

Section 1: Organization Information
AARP Foundation Tax-Aide is one of the many programs of the AARP Foundation and is often considered the Foundation's flagship program. AARP Foundation Tax-Aide is the nation's largest free, volunteer-run tax assistance and preparation service. AARP Foundation Tax-Aide has had 42 years of unparalleled service to taxpayers. AARP Foundation Tax-Aide serves low- and moderate-income taxpayers, with special attention to those 60 and older.

In 2011, AARP Foundation Tax-Aide volunteers, trained in cooperation with the Internal Revenue Service, helped 2.3 million taxpayers file their federal, state, and local tax returns at nearly 6,700 community-based sites nationwide. More than 93 percent of taxpayers assisted by AARP Foundation Tax-Aide had their tax return electronically filed, making refunds available to clients in a shorter period of time and eliminating mathematical errors that inherently occur with "pen and paper" prepared returns. Due to the speedier availability of tax refunds via e-filing, this can help older adults avoid taking out costly loans against their tax refunds, which generally carry high interest rates and fees. AARP Foundation Tax-Aide also provides free year-round tax assistance on the Internet. Trained, online counselors are available throughout the year to answer tax questions specific to low- and moderate-income taxpayers.

While this is a national program, it is run by volunteers at the local level. Nationally, AARP Foundation Tax-Aide is able to recruit or retain over 37,000 volunteers annually; 96% of whom report that they are "very satisfied" or "satisfied" with their volunteer experience. Many AARP Foundation Tax-Aide volunteers have been with the program for 15 years and many for even longer. AARP Foundation Tax-Aide provides immediate, tangible benefits to the people it serves; clients receive a tax return prepared by trained and IRS-certified individuals which is electronically filed so that those due a refund can receive it quickly and the risk of mistakes is reduced.

Since its inception ***(insert amount of time local AARP Foundation Tax-Aide has been in existence)*** years ago, ***(insert county)*** local AARP Foundation Tax-Aide program has been active and strong, with high level volunteer involvement. This local program, like other AARP Foundation Tax-Aide programs nationwide, are run entirely by volunteers. The local volunteers, not only assist with preparing taxes, but also with volunteer recruitment, promotion and acquiring local AARP Foundation Tax-Aide sites. AARP Foundation Tax-Aide has a highly organized volunteer structure. Locally, the volunteer structure and roles are:

- A **District Coordinator** (DC), who implements AARP Foundation Tax-Aide program, plans in the assigned geographic district within a state. The DC recruits, appoints, trains, supervises and evaluates Local Coordinators, Instructors, Communications Coordinators and Technology Coordinators. The DC monitors all activities in the district.

- A **Local Coordinator** (LC), who implements the AARP Foundation Tax-Aide program, plans in one or more assigned sites. The LC recruits, appoints, ensures adequate training, supervises and evaluates Counselors (tax preparers).
- **Tax Counselors**, who assist individuals with the preparation of their tax returns in accordance with the guidelines established between the IRS and the AARP Foundation. Training is provided.

In 2011, ***(insert number)*** volunteers participated in ***XYZ County's*** AARP Foundation Tax-Aide program. In 2011 alone, ***(insert local number)*** people in ***XYZ County*** received free tax preparation assistance from AARP Foundation Tax-Aide. It is estimated this assistance saved clients more than ***(insert appropriate number, $75 x the number of clients served)*** in tax preparation fees. Taxpayers save not only in tax preparation fees, which can be used to cover necessities such as food and medicine, but also AARP Foundation Tax-Aide volunteers help people apply for the Earned Income Tax Credit (EITC). The EITC is a refundable federal income tax credit for low-income working individuals and families. Through AARP Foundation Tax-Aide, taxpayers in ***XYZ County*** were able to take advantage of the EITC for a savings of ***(insert local numbers)***

Section 2: Proposed Project Information

The AARP Foundation and AARP Foundation Tax-Aide in ***XYZ County*** request ***(insert dollar amount)*** to address challenges faced by the local AARP Foundation Tax-Aide program, which include the challenges of volunteer recruitment, development of new sites and the need for technology equipment for electronic filing of tax returns. AARP Foundation Tax-Aide in ***XYZ County*** is a unique program in the community, providing free tax assistance to low- and moderate-income taxpayers, with special attention to those 60 and older.

Many low- and moderate-income individuals face several challenges with filing their income taxes: unfamiliarity with and difficulty understanding tax laws and forms especially changes in tax law; few resources to pay tax preparers; unfamiliarity with e-filing or no opportunity to file returns electronically for quicker refunds; and high interest rates charged on refund anticipation loans. They also face the challenge of learning how to use computers and the Internet to prepare their own taxes. The National Adult Literacy Survey found that 46 to 51 percent of the nation's adult population lacks the most basic skills to prepare a tax return.

The months of September through November are a time of volunteer recruitment. Training for AARP Foundation Tax-Aide volunteers occur in the months of December and January. The more volunteers engaged and trained, the more clients can be served. Between February and April, AARP Foundation Tax-Aide volunteers will provide tax assistance, preparation of returns, and e-filing of returns for low- and moderate-income seniors in ***XYZ County***. AARP Foundation Tax-Aide Counselors who provide assistance to taxpayers do so in a variety of settings. The "standard" AARP Foundation Tax-Aide site operates from one to six days a week at the same location during the tax season. Other sites are more transient, such as when counselors serve the needs of an assisted living facility, a nursing home, or a VA hospital, and move from one location to another. ***(Insert site information)***

Volunteer AARP Foundation Tax-Aide Counselors meet with clients to gather information that will assist them in tax preparation. The volunteers then enter that information into the IRS supplied software on their computers, check for accuracy and after getting client approval, file the return electronically with the IRS.

Throughout the AARP Foundation Tax-Aide program, there is also an urgent, ongoing need for computer equipment, especially portable computers to prepare taxes and for electronic-filing. The burden of locating computers in large part has been borne by local AARP Foundation Tax-Aide coordinators, who solicit local businesses for donated equipment. To relieve volunteers of this responsibility so that they can focus on other critical business functions of AARP Foundation Tax-Aide, a primary need is technology equipment. AARP Foundation Tax-Aide in ***XYZ County*** is in need of ***(insert number)*** computers and ***(insert number)*** printers.

Section 3: Goals and Evaluation

The AARP Foundation Tax-Aide project in ***XYZ County*** has several goals:

1. To increase service provided to the residents of ***XYZ County***.
2. To increase the number of tax returns processed by AARP Foundation Tax-Aide volunteers in ***XYZ County***.
3. To increase the capability of AARP Foundation Tax-Aide volunteers to file tax returns electronically, thus reducing the waiting period for low- and moderate-income seniors receiving tax refunds.
4. To increase the number of AARP Foundation Tax-Aide volunteers in order to maximize service to residents in ***XYZ County***.

AARP Foundation Tax-Aide has both new and returning clients every year, and we anticipate that we will be able to serve an additional number of clients in 2011. This project will be evaluated several ways. The success of the project will be measured by an increase in the number of clients served in the ***XYZ County*** area and the number of returns that are filed electronically.

There are several outcomes expected for the AARP Foundation Tax-Aide project in 2011:

1. The number of tax returns filed in ***XYZ County*** will increase by ***(to be determined locally)*** %.
2. The number of tax returns filed electronically by AARP Foundation Tax-Aide volunteers will increase by ***(to be determined locally)*** %.
3. A minimum number of ***(to be determined locally)*** volunteers will be recruited.

The AARP Foundation Tax-Aide program is extensively evaluated each year. The volunteer leaders of the program track the number of active sites and service locations, persons served, the returns filed, and so forth. In this proposed project, the same types of data will be collected.

Appendix I: Sample Volunteer Recruitment Press Release

FOR IMMEDIATE RELEASE Contact:
(Date) (**Name and number)**

AARP FOUNDATION TAX-AIDE SEEKS VOLUNTEERS FOR 2012

City, State—This year, AARP Foundation Tax-Aide, the nation's largest free, volunteer-run tax assistance and preparation service is seeking volunteers to assist in tax assistance and preparation and to become leadership coordinators. Volunteers of all ages and backgrounds are welcome. You do not need to be an AARP member or retiree to volunteer.

Volunteers receive free tax training and are reimbursed on a limited basis for qualified program-related expenses. They help customers one-on-one at tax sites. It is a great way to learn new skills and to be involved in your community.

Leadership positions coordinate program delivery by volunteers at sites at the local, state, or regional level or manage specific program activities such as technology, training, administration or communication. Although tax training and certification is encouraged, it is not required for many leadership positions.

Last year in (**insert state**), (**insert data**) AARP Foundation Tax-Aide volunteers helped more than (**insert data**) taxpayers at over (i**nsert data**) sites across the state.

"AARP Foundation Tax-Aide helps me feel good when I help others. The taxpayers that I have helped tell me how grateful they are and besides that, I have made lots of new friends!" **(Or use your own quote.)**

For more information on how you can join the AARP Foundation Tax-Aide team, contact (name of contact volunteer, address, telephone number), call our toll-free number, 1-888-OUR-AARP (1-888-687-2277), or visit our Web site at www.aarp.org/taxaide.

AARP Foundation Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

The AARP Foundation is AARP's affiliated charity. Foundation programs provide security, protection and empowerment for older persons in need. Low-income older workers receive the job training and placement they need to rejoin the workforce. Free tax assistance and preparation is provided for low and moderate income individuals, with special attention to those 60 and older. The Foundation's litigation staff protects the legal rights of older Americans in critical health, long-term care, consumer and employment situations. Additional programs provide information, education and services to ensure that people over 50 lead lives of independence, dignity and purpose. Foundation programs are funded by grants, tax-deductible contributions and AARP.

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Appendix J: Program Announcement Press Release

FOR IMMEDIATE RELEASE
(Date)

Contact:
(Name and number)

AARP FOUNDATION TAX-AIDE PROVIDES FREE TAX ASSISTANCE AND PREPARATION

(**City/Town, State)---**Free tax assistance and preparation for taxpayers with low- and moderate-income, with special attention to those age 60 and older, is available from AARP Foundation Tax-Aide from February 1 through April 15. You do not need to be a member of AARP or a retiree to use this service.

AARP Foundation Tax-Aide volunteers, trained in cooperation with the Internal Revenue Service, will offer help with personal income tax returns at various locations around **(insert area/county/city**).

(List locations of sites in surrounding area.)

"I really enjoy volunteering for AARP Foundation Tax-Aide. The taxpayer is so appreciative of having this resource," said **(name and title of volunteer spokesperson**). "Tax law can often be confusing. AARP Foundation Tax-Aide volunteers can make the process of filling out tax returns a whole lot easier." **(Name)** added that **(she/he**) has met many new people through volunteering.

Last year, **(# for your state)** AARP Foundation Tax-Aide volunteers helped more than (# **for your state**) people file their federal, state and local tax returns. The program is offered at approximately **(# for your state)** sites in **(your state)** including senior centers, libraries and other convenient locations.

Call our toll-free number, 1-888-AARPNOW (1-888-227-7669) or visit our Web site at www.aarp.org/taxaide, during this tax season, to locate an AARP Foundation Tax-Aide site near you.

AARP Foundation Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

The AARP Foundation is AARP's affiliated charity. Foundation programs provide security, protection and empowerment for older persons in need. Low-income older workers receive the job training and placement they need to rejoin the workforce. Free tax assistance and preparation is provided for low and moderate income individuals, with special attention to those 60 and older. The Foundation's litigation staff protects the legal rights of older Americans in critical health, long-term care, consumer and employment situations. Additional programs provide information, education and services to ensure that people over 50 lead lives of independence, dignity and purpose. Foundation programs are funded by grants, tax-deductible contributions and AARP.

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Appendix K: Computer Hardware Needs Press Release

FOR IMMEDIATE RELEASE CONTACT:
(Date) **(Name and number)**

AARP FOUNDATION TAX-AIDE SEEKS DONATED COMPUTERS FOR FREE E-FILING SERVICE

(City/Town, State)--AARP Foundation Tax-Aide, the nation's largest free, volunteer-run tax assistance and preparation service for low- and moderate-income taxpayers, with special attention to those age 60 and older, is in need of computer equipment for the upcoming tax season.

E-filing is definitely the way to file tax returns. E-filing permits taxpayers to receive their refund much sooner. It's easy, fast and free through our program. But, without computers and printers, we can't provide this crucial service," said (name and title of volunteer spokesperson).

Last year, 93% of taxpayers assisted by AARP Foundation Tax-Aide had their tax return electronically filed by volunteers at one of nearly 6,700 sites around the country using donated computers and printers.

Al Spencer, former Chair of the AARP Foundation Tax-Aide National Technology Committee, recently stated, "We rely heavily on donations of loaned computers and printers. Due to the high demand for e-filing, the program's inventory of donated computers and printers is in dire straits. We especially need (**insert data**) or better with a minimum (**insert data**) RAM and (**insert data**) MB hard disk space. We are also in great need of laser printers."

To donate a computer, printer or additional supplies to the AARP Foundation Tax-Aide program for the upcoming tax season, call (local contact). Donations are tax deductible under applicable law.

For more information on AARP Foundation Tax-Aide or to locate an AARP Foundation Tax-Aide site near you, call toll-free, 1-888-AARPNOW (1-888-227-7669), or visit www.aarp.org/taxaide.

AARP Foundation Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

The AARP Foundation is AARP's affiliated charity. Foundation programs provide security, protection and empowerment for older persons in need. Low-income older workers receive the job training and placement they need to rejoin the workforce. Free tax assistance and preparation is provided for low and moderate income individuals, with special attention to those 60 and older. The Foundation's litigation staff protects the legal rights of older Americans in critical health, long-term care, consumer and employment situations. Additional programs provide information, education and services to ensure that people over 50 lead lives of independence, dignity and purpose. Foundation programs are funded by grants, tax-deductible contributions and AARP.

Appendix L: Letter to a Community Group

Date

Name
Organization
Address
City/State/Zip

Dear Name:

Tax season is quickly approaching and many people need help filing their tax returns. AARP Foundation Tax-Aide can help -- and we want to make sure your members know about this tax assistance and preparation service with free e-filing.

AARP Foundation Tax-Aide's has over 37,000 volunteers assisting taxpayers with low- and moderate-income, with special attention to those age 60 and older, in filing their federal, state and local tax returns. In 2011, AARP Foundation Tax-Aide assisted over 2.3 million taxpayers at nearly 6,700 sites nationwide. In our state alone, we assisted _____ people during last year's tax season.

AARP Foundation Tax-Aide volunteers, who are trained in cooperation with the Internal Revenue Service, can help taxpayers prepare their 1040EZ, 1040A and 1040 tax forms.

We can arrange a knowledgeable speaker to discuss AARP Foundation Tax-Aide and its services to your group. Please contact me at (phone number), for more information.

I have enclosed an AARP Foundation Tax-Aide program description and program and volunteer recruitment brochures for your review. I have also enclosed a list of AARP Foundation Tax-Aide sites in your area.

AARP Foundation Tax-Aide is a valuable community service, and we hope you will educate your members about this free tax assistance and preparation service available to them and the community.

Sincerely,

Your name and volunteer title
AARP Foundation Tax-Aide

Appendix M: Sample Radio PSA

General Program Promotion-30 seconds – Use only during tax season from February 1 – April 15

Need Help With Your Taxes?

AARP Foundation Tax-Aide is here for you. Our IRS-certified volunteers will help you file…for free.

Call toll-free 1-888-AARPNOW at 1-888-227-7669. Or visit us at www.aarp.org/taxaide.

AARP Foundation Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

Electronic Filing-30 seconds – Use only during tax season from February 1 – April 15

AARP Foundation Tax-Aide brings you free electronic filing of your tax returns. The service is fast…accurate...and our IRS-certified volunteers are ready to help low and moderate income taxpayers of all ages.

To locate an electronic filing site near you, or to access our on-line tax service, visit www.aarp.org/taxaide or call toll-free 888-227-7669.

AARP Foundation Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

Volunteer Recruitment-30 seconds – Use only in the fall of each year

Narrator and Two Women

Woman 1: Great workout. I feel terrific.

Woman 2: Me, too, nice day for a run.

Woman 1: Speaking of health, I read recently that doing volunteer work is good for you. But I don't know if I have time for that.

Woman 2: You need something flexible…like volunteering for AARP Foundation Tax-Aide. It works with my schedule. I'm meeting people and really feel good about helping them.

Woman 1: Sounds like something to look into.

Narrator: Call 1-888-OURAARP to volunteer. AARP Foundation Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

Español

Promoción general del programa - 30 segundos - Use only in the fall of each year

¿Necesita ayuda con sus impuestos?

El Programa de AARP Fundación Tax-Aide está aquí para usted. Nuestros voluntarios certificados por el Servicio de Impuestos Internos (IRS, por sus siglas en inglés) lo ayudarán a confeccionar su declaración de impuestos, sin costo alguno.

Llame, sin cargo, al 1-888-AARPNOW (1-888-227-7669) o visítenos en www.aarp.org/taxaide.

El Programa de AARP Fundación Tax-Aide es un programa de AARP Fundación, ofrecido conjuntamente con el Servicio de Impuestos Internos (IRS).

Tramitación electrónica - 30 segundos - Use only in the fall of each year

El Programa de AARP Fundación Tax-Aide le permite confeccionar y tramitar su declaración de impuestos en forma electrónica y gratuita. El servicio es rápido, preciso y nuestros voluntarios certificados por el Servicio de Impuestos Internos (IRS, por sus siglas en inglés) están listos para ayudar a contribuyentes de ingresos bajos y medianos de todas las edades.

Para ubicar un sitio cercano desde el cual tramitar electrónicamente su declaración de impuestos, o para acceder a nuestro servicio impositivo en línea, ingrese en www.aarp.org/taxaide o llame, sin cargo, al 888-227-7669.

El Programa de AARP Fundación Tax-Aide es un programa de AARP Fundación, ofrecido conjuntamente con el Servicio de Impuestos Internos (IRS).

Reclutamiento de voluntarios - 30 segundos - Use only in the fall of each year

Narrador y dos mujeres

Mujer No. 1: ¡Qué buen ejercicio! Me siento estupenda.
Mujer No. 2: Yo también. Lindo día para correr.
Mujer No. 1: A propósito, acabo de leer que el trabajo como voluntario es bueno para quien lo realiza. Pero no sé si tengo tiempo disponible para ello.
Mujer No. 2: Necesitas algo que sea flexible como, por ejemplo, el programa de AARP Fundación Tax-Aide. Es compatible con mis demás actividades y horarios. Estoy conociendo a muchas personas y realmente me hace sentir bien ayudarlas.
Mujer No. 1: Parece algo interesante.

Narrador: Llame al 1-888-OURAARP para ofrecerse como voluntario. El Programa de AARP Fundación Tax-Aide es un programa de AARP Fundación ofrecido, conjuntamente, con el Servicio de Impuestos Internos (IRS).

Appendix N: Television PSA

General Program Promotion-30 seconds - Use only during tax season from February 1 – April 15

Need Help With Your Taxes?

AARP Foundation Tax-Aide is here for you. Our IRS-certified volunteers will help you file…for free.

Call toll-free 888-227-7669. Or visit us at www.aarp.org/taxaide. AARP Foundation Tax-Aide…people helping people.

AARP Foundation Tax-Aide is offered in conjunction with the IRS.

Electronic Filing- 30 seconds - Use only during tax season from February 1 – April 15

AARP Foundation Tax-Aide brings you free electronic filing of your tax returns. The service is fast…accurate...and our IRS-certified volunteers are ready to help low- and moderate-income taxpayers of all ages.

To locate an electronic filing site near you, or to access our on-line tax service, visit www.aarp.org/taxaide or call toll-free 1-888-AARPNOW (888-227-7669).

AARP Foundation Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

Volunteer Recruitment-30 seconds - Use only in the fall of each year

Join the AARP Foundation Tax-Aide Team

Tax time can be fun time if you're an AARP Foundation Tax-Aide volunteer! Meet new people. Help them with their taxes. Make a difference in their lives.

Along the way, feel a sense of accomplishment! You don't have to be a math expert, just be ready to learn and help others.

Call 1-888-OURAARP to volunteer. That's 1-888-687-2277.

AARP Foundation Tax-Aide is offered in conjunction with the IRS.

Español

Anuncios Televisivos de Servicios Públicos

Promoción general del programa - 30 segundos

¿Necesita ayuda con sus impuestos?

El Programa de AARP Fundación Tax-Aide está aquí para usted. Nuestros voluntarios certificados por el Servicio de Impuestos Internos (IRS, por sus siglas en inglés) lo ayudarán a confeccionar su declaración de impuestos, sin costo alguno.

Llame, sin cargo, al 888-227-7669 o visítenos en www.aarp.org/taxaide. Programa de AARP Fundación Tax-Aide, gente ayudando a la gente.

El Programa de AARP Fundación Tax-Aide es un programa de AARP Fundación, ofrecido conjuntamente con el Servicio de Impuestos Internos (IRS).

Tramitación electrónica - 30 segundos

El Programa de AARP Fundación Tax-Aide le permite confeccionar y tramitar su declaración de impuestos en forma electrónica y gratuita. El servicio es rápido, preciso y nuestros voluntarios certificados por el Servicio de Impuestos Internos (IRS, por sus siglas en inglés) están listos para ayudar a contribuyentes de ingresos bajos y medianos de todas las edades.

Para ubicar un sitio cercano desde el cual tramitar electrónicamente su declaración de impuestos, o para acceder a nuestro servicio impositivo en línea, ingrese en www.aarp.org/taxaide o llame, sin cargo, al 1-888-AARPNOW (888-227-7669).

AARP Foundation Tax-Aide es un programa ofrecido conjuntamente con el IRS.

Reclutamiento de voluntarios - 30 segundos

Únase al equipo del Programa de AARP Fundación Tax-Aide.

El tiempo que demandan los trámites impositivos puede ser divertido si usted es un voluntario del Programa de AARP Fundación Tax-Aide. Conozca gente. Ayúdela con sus impuestos. Haga una diferencia en sus vidas.

De paso, ¡siéntase realizado! No necesita ser un experto en matemáticas para estar dispuesto a aprender y ayudar a otros.

Llame al 1 888 OUR-AARP para ofrecerse como voluntario. Es decir, 1-888-687-2277.
AARP Foundation Tax-Aide es un programa ofrecido conjuntamente con el IRS.

Appendix O: Frequently Asked Questions (FAQs)

Q. What is AARP Foundation Tax-Aide?
A. AARP Foundation Tax-Aide is the nation's largest free, volunteer-run tax assistance and preparation service for taxpayers with low- and moderate-income, with special attention to those age 60 and older.

Q. Where is this done?
A. From February 1 through April 15, tax assistance and preparation is done at temporary sites, such as senior centers, libraries, banks, and hospitals. To locate a site near you, call our toll-free number. The toll free number and Web site locator are available Jan 15-April 15. Call 888-AARPNOW (1-888-227-7669), or visit our Web site at www.aarp.org/taxaide.

Online assistance is available all year. To ask a tax question online, visit our Web site at www.aarp.org/taxaide and click on the link under "Online Tax Assistance."

Q. How many people are involved in this program?
A. (Your state) has about (your state#) counselors at (your state #) locations. Nationwide, the AARP Foundation Tax-Aide volunteer corps is comprised of over 35,000 individuals who serve in a variety of volunteer positions.

Q. Is AARP Foundation Tax-Aide a new program?
A. AARP Foundation Tax-Aide is the AARP Foundation's oldest and largest community service program. Begun in 1968 in Washington, D.C., the program is nationwide and over 2.5 million taxpayers in 2011. Last year, AARP Foundation Tax-Aide served more than _____ people in (your state).

Q. How is the Internal Revenue Service (IRS) involved?
A. IRS manages a program called Tax Counseling for the Elderly (TCE). IRS, through the U.S. Congress, provides grants to third parties to deliver tax-related services to taxpayers at no charge. AARP Foundation Tax-Aide is an IRS TCE grant recipient.

Q. What kinds of tax returns do your volunteers do?
A. We do basic IRS 1040EZ, 1040A, and 1040, and handle the forms necessary for such items as tax credit for the elderly and credit for child and dependent care. We also do state and local returns. Returns can be completed by paper or electronically using our free e-filing service at AARP Foundation Tax-Aide sites.

Q. What other services do you provide?
A. For those with Web access, we provide year round online tax assistance via our Web site at www.aarp.org/taxaide. In certain circumstances, provisions can also be made whenever possible to provide home visits for those who are physically unable to leave their home.

Q. Do you help mostly older persons?
A. The funding for our expenses is granted to assist persons 60 and older, but we help taxpayers with low- and moderate-income within the scope of our training. Membership in AARP is not required to receive this free service.

Q. Do your volunteers work year-round?
A. Our sites are open from February 1 through April 15 every year, but our volunteers may help individuals at other times. Those volunteers who answer tax questions via our online tax assistance service work year-round.

Q. Do AARP Foundation Tax-Aide volunteers ever charge for their services?
A. Never! Our services are completely FREE.

Q. Do you find a conflict with professional tax preparers?
A. Some of our volunteers are tax professionals, CPAs, or enrolled agents, who give of their time to help persons who cannot afford their professional services.

Q. Do a lot of people make errors?
A. The IRS estimates that as many as half the older people who do their own returns overpay, because they are not aware of credits and exclusions to which they are entitled. They do not get the overpayment back if there is nothing on the return to indicate they are entitled to some credit. On the other hand, if they make a calculation error and underpay, they are subject to a penalty.

Q. How are your volunteers certified and trained to avoid errors in returns?
A. Our volunteers are trained under IRS supervision and are IRS certified. We take pride in the fact that returns prepared by our volunteers have the highest percentage of accuracy of any group passing through IRS Quality Review. The taxpayer, not the volunteer, is solely responsible for his/her return.

Q. How can taxpayers get AARP Foundation Tax-Aide help?
A. They can call our toll-free number during the tax season (Feb. 1 – April 15) **1-888-AARPNOW (1-888-227-7669**) or visit our Web site at **www.aarp.org/taxaide** to locate a tax site near them. Taxpayers can also use our year-round online assistance service on our Web site.

Q. What should taxpayers bring with them when they come for help?
A. They should bring copies of last year's tax returns; all W-2 and W-2p forms from each employer (if a salary was earned); Unemployment Compensation Statements; SSA-1099 form (if paid Social Security benefits); and all 1099 forms (1099-INT, 1099-DIV, 1099-misc., etc.) showing interest and/or dividends; 1099 R forms from the payer of your pension or annuity; all forms indicating federal income tax paid; child care provider information; all receipts or canceled checks if itemizing deductions; and Social Security cards or other official documentation for themselves and all dependents.

Q. If someone is interested in becoming an AARP Foundation Tax-Aide volunteer, what do they need to do?
A. Volunteering with the AARP Foundation Tax-Aide program is easy. In the fall of each year, they can call toll-free, **1-888-OUR-AARP (1-888-687-2277)** 24 hours a day, seven days a week and leave their name and number. A volunteer will return the call. Or, they can visit our Web site at **www.aarp.org/taxaide** and complete our online volunteer recruitment form.

Q. What kind of experience is needed to become an AARP Foundation Tax-Aide volunteer?
A. Our volunteer force includes individuals of all ages, races, ethnic groups, income levels and educational backgrounds. To become an AARP Foundation Tax-Aide volunteer, you must possess a desire to give of your time to help others. Membership in AARP is not required.

- If you wish to be a tax volunteer, you will be trained and must pass the IRS certification test.

- If you wish to volunteer for another position, you will greet clients as they enter the site and organize their paperwork in preparation for seeing a tax volunteer; coordinate program delivery at the local, state, or regional level; or manage specific program activities such as technology, training, administration, or communication. Although tax training and certification is encouraged, it is not required for many other positions.

Q. Do volunteers receive any special training?
A. AARP Foundation Tax-Aide volunteers receive comprehensive training in cooperation with the IRS.

Q. Does it cost money to volunteer with AARP Foundation Tax-Aide?
A. No. Program-related expenses are reimbursed on a limited basis for qualified program-related expenses.

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