

AARP Foundation Tax-Aide

Published by the AARP Foundation Tax-Aide Program.

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

District Coordinator Guide

2011-2012

Website for the public: www.aarp.org/taxaide
Website for volunteers (Extranet): www.aarp.org/tavolunteers
Portal: <https://volunteers.aarp.org>

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INTRODUCTION

This District Coordinator Guide is designed to provide assistance to all District Coordinators. *It is most important to understand that this guide does not in any way set policy.* The AARP Foundation Tax-Aide Policy Manual published by the National Office is the official policy manual for all facets of the program.

District Coordinators can find themselves in the position of not knowing their specific duties and responsibilities and how and when to carry out these duties and responsibilities. The purpose of this guide is to give direction and guidance on these duties and responsibilities and to provide both a road map and a calendar for the major activities. It is understood that all states are different in their demographic make-up and their methods of operation. States with many large urban sites may well have different problems and methods than states with mainly small rural sites. Most states will obviously have both situations. The District Coordinator is strongly encouraged to be more of a leader than a hands-on type of administrator. However, there are and will be instances where the District Coordinator must wear several hats as they manage their districts. A strong District Management Team and support from Local Coordinators are helpful, but it's not always possible to recruit for those positions. An attempt was made to recognize this fact as this guide was written.

Finally, thank you for volunteering to be a District Coordinator.

THE DISTRICT COORDINATOR

The District Coordinator is a key leader in the AARP Foundation Tax-Aide program.

The District Coordinator needs to possess good interpersonal skills and the ability to get along with people of differing backgrounds and ability levels. It is important that the DC have the ability to communicate with all volunteers in the district, recognizing that communication is highly important to district success. Organizational skills are essential for ensuring that district activities are successfully completed. The DC should be ready at all times to recognize volunteers for tax assistance, time commitment, and years of service.

The District Coordinator is ultimately responsible for all activities in the district including equipment usage, obtaining supplies, establishing and maintaining tax sites, maintaining a cadre of certified counselors and all the other positions often needed at a site or in a district. They provide the State Coordinator and State Management Team members with required reports and/or information. The District Coordinator reports directly to the State Coordinator of his/her respective state. Members of the District Management Team (DMT), Local Coordinators, and Instructors, report directly to the District Coordinator. Shift Coordinators, Counselors and Client Facilitators report to a Local Coordinator.

The District Coordinator has a number of responsibilities. A District Coordinator delegates many tasks and responsibilities to the members of the District Management Team. He/she should then monitor and ascertain that the work is being done in a timely and correct fashion.

Each state has a State Management Team (SMT) which consists of the State Coordinator (SC), an Administration Specialist (ADS), a Technology Specialist (TCS), a Training Specialist, (TRS), a Partnership and Communication Specialist (PCS), and a Prospective Volunteer Specialist (PVS). The SMT generally sets state practice which must align with National policy. These policies flow from National to the regions, states and then downward to the district and local site levels.

The State Coordinator is the final authority in each state. The SMT members are available to you as a District Coordinator for assistance and guidance, particularly in their areas of specialty. They will be in contact with you periodically and will need your assistance with equipment needs, inventory, training needs, and tracking personnel. It is most important that you maintain a healthy relationship with the SMT. Each state also has one or more SPEC (IRS offices) with one or more IRS Relationship Managers who work closely with the AARP Foundation Tax-Aide program.

These personnel generally work with the State Coordinator and the SMT. Generally, all requests from IRS Relationship Managers should be referred to the State Coordinator.

Your State Coordinator will provide you with the names and contact information for all District Coordinators and SMT members in your state.

As a District Coordinator, do not hesitate to ask for guidance and assistance. It is hoped that you will constantly be looking for ways to improve your methods, your district operation, and to assist any newly appointed DC/LC who might need or request it.

It is important that you, as a District Coordinator, become very familiar with the official policies of the program. Doing so can greatly assist you. The official information site for the AARP Foundation Tax-Aide program is found on the Internet and can be accessed by using the Internet address: www.aarp.org/tavolunteers. This site is often known as the *Extranet*. You can find guides for many positions, the official *Policy Manual*, *Operational Guidelines* manual, order forms for supplies and awards, and information on encryption and anti-virus software.

The AARP Volunteer Portal is an easy to use website that brings access to systems such as Activity Reporting that can help to facilitate your responsibilities and much, much more. Access to the systems within the portal is available to volunteers and leaders depending on their position. The following chart lists systems that are currently available for use by DC and LCs. Additional information about the Portal is provided in the Operational Guidelines.

	State Management Team (SMT)					District Management Team (DMT)							Leader (Other)			Non-Leader		
	SC	ADS	TCS	TRC	PCS	DC	LC	AC	TC	TRC	CC	INS	PVC	SCO	ERO	COU	CF	NC
My Preferences																		
▶ Tax-Aide Extranet	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Recruitment																		
▶ Add Prospective Volunteer	X	X				X							X					
▶ Review Prospective Volunteer	X	X				X							X					
▶ Display Activity Summary	X	X				X							X					
Sites																		
▶ Update Site Information	X	X				X	X											
▶ Report Site Activity						X	X											
Program Material																		
▶ Order Material	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X			
As of 07/01/11																		

DISTRICT MANAGEMENT TEAM ORGANIZATION AND DUTIES

The District Management Team (DMT) consists of the District Coordinator (DC), the Administration Coordinator (AC), the Technology Coordinator (TC), the Training Coordinator (TrC) and the Communications Coordinator (CC). Each individual district may not have all of the above positions. Some districts may include the Local Coordinators as contributors to the DMT. The District Management Team (DMT) mirrors the functions of the State Management Team (SMT), and members of the DMT should work with their counterparts on the SMT in order to provide the best possible information and support to their District Coordinator. If at all possible it is desirable that members of the DMT not also hold other leadership positions as doing so can dilute their focus on District matters. Also, allowing individuals to hold multiple leadership positions reduces the opportunities for other volunteers to experience leadership responsibilities and for the District to develop future leaders. Members of the DMT may serve as Instructors if needed.

A very brief description of the major responsibilities of each member of the DMT follows. Complete position descriptions are available on the Extranet under the Leadership Development tab. DCs retain the authority to adjust the duties of members of the DMT as needed to fulfill their overall mission. *If a DMT position is not and cannot be filled, the DC should assume responsibility for the duties of that position.*

DISTRICT COORDINATOR (DC): Coordinates the work of leaders and other volunteers in the operation of sites in the district.

- The DC recruits, appoints and trains members of the DMT and Local Coordinators.
- The DC evaluates prospective volunteers and determines whether they will be invited to take part in training and subsequently whether they will be offered a volunteer assignment in the district. The DC assures that all prospects have a record in the Volunteer Recruitment system.
- In conjunction with the TRS the DC coordinates the training of Instructors following state direction and establishes training programs for Counselors, EROs and other volunteers.
- The DC assures compliance with national security policies for taxpayer information and for AARP Foundation Tax-Aide and IRS equipment.
- The DC attends the state meeting and then plans and conducts district meetings with the DMT and Local Coordinators.
- The DC assures that administrative actions and reports including site information, volunteer rosters and activity reports are accurately prepared and submitted to meet state and national information needs.

- The DC provides general direction to volunteers regarding expenditures in accordance with national policies and approves the expense statements of all leaders in the district.
- The DC serves as the official “point of contact” in the **district** for communication to and from: IRS and SPEC, SMT, SC, AARP National Office, and the general public. **It is important for DCs to recognize their position in the chain of command and to communicate with their State Coordinator as well as to and for direct reports and districts.**

ADMINISTRATION COORDINATOR (AC): Coordinates district administrative activities.

- Collects information from other members of the DMT and LCs as necessary to prepare reports on sites, volunteers, and activity.
- Distributes administrative information to the ADS and other members of the DMT and LCs as needed.
- Provides information and advice on expense procedures and works with the TrC to insure that required policy and administrative information is given to all volunteers annually.
- Works with the TC on equipment allocation and inventory reporting as directed by the DC.

TECHNOLOGY COORDINATOR (TC): Coordinates district technology activities

- Arranges with TCS for computer equipment needs and maintains an inventory of all equipment (including host provided equipment).
- Performs or assists in computer software installation, upgrades, etc., including TaxWise.
- Coordinates with TCS for maintenance, upgrading and disposition of computer equipment.
- Assists Local Coordinators and EROs in establishing procedures for electronic filing to conform to AARP Foundation Tax-Aide requirements.
- Conducts or assists in the conduct of e-file training.
- Coordinates set up and take down of equipment. Provides ongoing technical assistance to LCs and EROs as needed.
- It is acceptable for districts to have more than one TC; one should be designated as the “Lead” and will be the primary contact with the TCS and should maintain necessary communications each way with the other TCs.

TRAINING COORDINATOR (TrC): Coordinates district training activities.

- Selects or assists in the recruitment and selection of Instructors.
- In conjunction with TRS verifies that Instructors are trained and certified. Provides certification lists to the DC, TRS and AC.
- Establishes a training schedule and syllabus for classes; arranges for space to conduct training; notifies new and returning volunteers of training requirements and schedules.
- Coordinates with TCs and LCs for the use of equipment for training.
- Orders training materials and distributes as needed.
- Monitors instruction.
- Directs testing procedures and schedules for Counselors and notifies the TRS and AC of volunteers who have passed the test and are certified. Verifies that all volunteers have signed IRS Form 13615 Standards of Conduct Volunteer Agreement

COMMUNICATIONS COORDINATOR (CC): Coordinates district communication activities

- Develops and implements plans for recruiting new volunteers and assists in the retention of current volunteers.
- Works with the Prospective Volunteer Coordinator (PVC) to receive and process new volunteer information routed from the National Office.
- Establishes relationships with local media and arranges for free advertising for volunteers and site availability.
- Works with LCs and other volunteers for the placement of posters, cards, etc., advertising volunteer opportunities and site availability.
- Works with the PCS, DC and other leaders on the development of Partner Programs.
- Assists in locating new and replacement sites.
- May work with the DC and TC in promoting donations of equipment and funds.

DISTRICT MEETINGS: When practical, it is desirable to hold two district meetings, one in the fall after the State Coordinator’s meeting with DCs and before the start of training and the other shortly after the end of the tax season and before the state end of season meeting(s) if held. The DMT and all Local Coordinators should be invited and the DC may choose to include, with reimbursement policy in mind, Shift Coordinators and Instructors. Transportation, but no other expense, is authorized for these two meetings (National Policy Manual, Chapter 9).

- The fall meeting is the primary opportunity to convey information on new and continuing requirements on the full range of activities from the National Office, IRS and the SMT. Training, activity reporting, site management, and software and equipment technical information are frequent subjects. Problems can be identified and solutions developed. It is also an opportunity for the DC and the other DMT members to become more familiar with other leaders in the district both to develop good current working relationships and to help identify those potentially capable of greater responsibilities. The TRS-led Instructor Workshops for tax law preparation and procedures are sometimes attached to this fall meeting.
- The spring meeting is an opportunity for the DC and other members of the DMT to hear from the LCs and other leaders how everything worked; the difficulties encountered and their solutions; equipment status, volunteer status, site issues, etc. It is suggested that the DMT be in the “listening” mode for the major part of the meeting. They can meet later to review what was said and develop the appropriate responses. Information from the attendees can be summarized and may form a part of the DC’s report to the SC at a state end of season meeting and/or separately.

Tasks and Responsibilities

Timelines, References, and Comments

The District Coordinator has a number of tasks and responsibilities. An active District Management Team can be helpful and effective in completing those tasks. The following is a non-inclusive task list with dates, timelines, references, and comments. Potential DMT members who might assist with a task are indicated in parentheses next to the task. DCs are ultimately responsible for their DMT. As a DC, you should become familiar with the AARP Policy Manual, Operational Guidelines, and position descriptions. You should have them available for reference at all times.

Tasks and Responsibilities

Timelines, References, and Comments

Arrange for Tax Sites (LC)

Year round - See *Operational Guidelines – Volunteer Recruitment and Appointments*

Information on all new tax sites must be forwarded to ADS. *Operational Guidelines –Sites*

Opening a New Site (LC)

Prior to January 1 Three criteria to meet:

1. Must be able to generate 35 or more e-files at the site
2. Must have a minimum of two certified Counselors at the site
3. Must be able to obtain the required equipment to operate the site

Acquiring SIDN for a new site (AC,TC)

Must be done through ADS, optimally by mid-September and can be accomplished in a few days.

Acquiring an EFIN for a new site (AC,TC)

Contact designated member of SMT who will work with the IRS Relationship Manager in your district's area. Preferably, before late-September as applying for a new EFIN can take up to six weeks.

Recruitment

- Counselors
- Client Facilitators
- Instructors

See *Operational Guidelines- Volunteer Recruitment and Appointments*

Appointments

- Local coordinators
- All other positions as needed in your District
- Instructors

All new and/or changed appointments must be sent to ADS throughout the year.

Ordering of equipment for sites. (TC)

June and July Coordinate with your State Coordinator and/or State Technology Specialist. (You do not order any equipment.) See *Operational Guidelines – Equipment Management and Ordering*

Attend the State District Coordinator Meeting

October or November. State Coordinator will contact you. It is extremely important that you attend this meeting. The latest in both national and state policy and procedural changes, as well as any state changes, will be discussed. State goals and objectives will be discussed. It is then your responsibility to relay these to all volunteers reporting to you. (LC meeting)

Set up Local Coordinators meeting for your district to acquaint them with new policies and procedures, and to provide guidance for site management, etc.

After the State meeting at a time and place of your choice. See *Policy Manual, Reimbursement Policies, for expense information.*

Coordinate the Ordering of Training Materials for all Instructors and Counselors. (TrC)

September, October, November: Work with State Training Specialist or designated SMT member. Generally, TRS will contact you with specific questions and/or requests. See *Operational Guidelines – Ordering Program Materials.*

Ordering of TaxWise Software (AC,TC)

September through January: Work with the designated member of the SMT (ADS or TCS). All sites ordering software must have an EFIN and SIDN. All must have produced 35 or more e-files in prior year or have SC and RC approval. See *Operational Guidelines – Ordering Program Materials.*

Tasks and Responsibilities

Timelines, References, and Comments

Order all needed AARP supplied materials for tax sites in your district. These include items such as expense forms, tax record envelopes, intake sheets, site information forms, program posters, etc. (LC,AC)

Action by LC's: Usually do this in **October or November** using the online ordering system from the Portal. Alternatively, this may be completed using the order form obtained on the AARP Extranet.

Order IRS tax forms and publications (LC,AC)

Action by LC's: October or November: Use form **2333V**: Contact ADS for specific directions. Your (SPEC) Tax Specialist is also involved in this task. States will differ in how they handle this task.

Order state tax forms for those needing them. (LC,AC)

Action by LC's: October or November: Contact Division of Taxation in your state for ordering procedures.

Assist TRS in providing needed information on those who should attend State Instructor Workshops. (TrC)

November - December – January: The State Training Specialist will contact you requesting assistance in this. The SC/TRS will provide guidance as to how many may attend from each district. *See Policy Manual – Volunteer Recruitment and Training*

Before tax law classes begin verify with TRS that all Instructors have successfully passed their tests and that all test results have been sent to the state TRS. (TrC)

Tasks and Responsibilities

Timelines, References, and Comments

Coordinate the establishment of Local Counselor Training Workshops and/or Instructor Training in your district. If needed, set up local workshops for additional Instructor training. (TrC)

December - January: Will need facilities for this (no charge) along with needed equipment such as projectors, overheads, etc. *See Policy Manual-Reimbursement Policies for expense limitations.* Contact SC and/or SMT members for guidance if needed.

Verify that all volunteers have received administration training

Verify that all volunteers have been trained in AARP Foundation Tax-Aide policy including proper completion of expense statements

Confirm that all Counselors are certified and have signed IRS Standards of Conduct Volunteer Agreement. Verify that Certified lists have been provided to IRS (TrC, AC)

By February 1 Ensure notification of ADS and TRS after Counselors have met the certification requirements. Ensure notification of ADS prior to start of season on all new Client Facilitators.

Ensure that all new volunteers (Counselors and Client Facilitators) have records in the Volunteer Recruitment system with a status of Accepted (DC, AC)

Tasks and Responsibilities

Establish process, procedure, and determine training for:

- **Installation and use of Anti-Virus software**
- **Installation of encryption software**
- **Installation of TaxWise including EFIN, SIDN, passwords, and DCN starting numbers**
- **Quality Review procedures**
- **Use of “Intake Sheets” and “Activity Reporting, QR and ERO Log”**
- **Use of the TaxWise software**
- **Back up procedures for all returns**
- **Accessing the CCH Support Center for needed updates and for assistance**
- **Activity Reporting, Site Based Management System and Online Materials Ordering on the Portal**
- **ERO Training**
- **Basic, Intermediate, and Advanced Tax Training**
- **IRS Standards of Conduct/AARP Foundation Standards Package (DMT)**

Timelines, References, and Comments

These activities normally are taught and/or covered at the Local Counselor Training Workshops. The DC or LC will usually present the Administrative material and the Instructor will do the tax training which may include TaxWise training. If a Technology Coordinator is available, that person may be also utilized for TaxWise training and ERO training. Client Facilitators must be included in the Administrative section of training. A DC must ascertain that all instructors and presenters understand their function and that all needed areas are being covered. The number of days a Training Workshop is in session depends upon the local needs and circumstances. If you need guidance, contact your SC and/or your TRS and TCS

Tasks and Responsibilities

Timelines, References, and Comments

Ascertain that all tax sites in your district have the required supplies and manuals/guides:

- Paper, computers, printers, and other supplies necessary for beginning the tax season
- Publication 4012
- Publication 3189
- Pub. 17
- State Publications, if needed
- Required AARP poster D143
- Intake and Interview Sheet
- Activity Reporting, QR and ERO Log (AC)

Prior to February 1: If you are in need of additional computers and/or printers, contact the designated member of the SMT (ADS or TCS) and/or your SC. *See Policy Manual – Reimbursement Policies about reimbursable materials*

Site and Personnel changes

Keep ADS informed of all site and personnel changes as they occur to keep VMIS correct and up to date.

Provide leadership for all tax sites in your district. (DMT)

February 1 through April 15: If possible, track number of returns being done, number of rejections, etc. Especially over-see new volunteers. Make certain that all sites are using the “Activity Reporting system” correctly. Observe if “Intake and Interview sheets” and Quality Review are being done correctly. Determine if 8879’s are being signed and accounted for in a timely manner. Make certain that all TaxWise and state updates are installed as needed. Check the Portal-based Site Management system to ascertain that sites have provided the days and times they will be open and have provided a number to call if they offer appointments. If there are problems with updating data, contact your ADS for assistance.

Be prepared to assist in solving problems with both equipment and/or tax problems. Occasionally, the SC may contact you with a complaint that he/she has received about a situation at a site. It is your responsibility to resolve these problems as best you can.

Tasks and Responsibilities

Timelines, References, and Comments

Verify with TC and TCS that all IRS laptops in your district have been “wiped” and sent back to the IRS depot.

After April 15 and prior to May 1: *See the Technology page of the Extranet. Also See Policy Manual – Confidentiality and Security of Taxpayer Data and Electronic Filing of Tax Returns*

Make certain that all AARP laptops have been cleaned using required AARP Foundation Tax-Aide software and are stored appropriately. *This includes all personal computers used for tax purposes.* (TC)

After April 15 and prior to May 1: *See the Technology page of the Extranet. Also See Policy Manual – Confidentiality and Security of Taxpayer Data and Electronic Filing of Tax Returns*

Make certain that all AARP and/or IRS printers have been stored appropriately. (TC)

After April 15 and prior to May 1: *Do not use commercial storage without SC approval.*

If your state or district is using “carry forward” data, ascertain that every site using it has sent it to the appropriate place for safe-keeping as indicated by your state policy. (TC)

After April 15 and prior to May 1: *Check with your TCS/SC if you need assistance in this.*

Make a final review of “Activity Reporting” in your district. Make any needed changes. (AC)

April 15 through May 1: *Contact ADS if you need assistance.*

Check and submit all Expense Statements for all volunteers who report to you. Encourage Direct Deposit for faster reimbursements.

After April 15: Follow the procedures set up by your SC for all volunteers that will or have exceeded the mileage limitations for Counseling expenses (Activity Code “I”) as set by your SC. Check all expense vouchers carefully for correct coding, and data entry. **It is strongly suggested that the Electronic “Excel” versions as found on the “Extranet” be used if automation is not.** *See Policy Manual - Reimbursement Policies for detailed instructions.*

Send your expense statement to State Coordinator for approval (DC)

At any time in the year, but certainly after April 15: (Use Electronic version if at all possible)

Determine sites that should remain open for the next year. (DMT)

After April 15 or as requested by State Coordinator.

Assist the appointed SMT member in keeping an accurate inventory.

This is a year round and very important task. Contact either your State Coordinator or State Technology Specialist for guidance. *See Policy Manual – Equipment Management and Ordering – Always use the correct inventory form when sending information to TCS or designated individual. Send equipment location changes immediately to TCS or designated individual.*

Tasks and Responsibilities

Timelines, References, and Comments

Site Efficiency (DMT)

June and July: If you have sites that did not produce the required minimum of 35 e-files, you will be contacted by the SC. Together you will determine if the site should remain active or be closed.

Site Consolidation (DMT)

June, July, August: Are there several small sites that need to be consolidated into one large site? Visit with SC for guidance.

Incident Review

As needed: Participate in and lead incident review using the Incident Review Protocol.

“Summarized Volunteer Program Assessments” and send summary to SC

By May 1

Other Items of Interest:

Donations (un-solicited) (DC)

If donations are received (un-solicited), they should be forwarded to the SC. He/she will forward them on to the correct department at the national level where they will be credited to the state donated funds account.

Use of Donated Funds (DC)

Donated funds can only be used with SC approval. If you are in need of equipment, etc. that cannot be paid by the program, always contact your SC prior to any purchase.

Donations, Grants, Partnerships (DC)

If your state has a Partnership and Communication Specialist on the SMT, generally this person will handle these activities. If there is no such position on your SMT, then contact your SC. Do not engage in these activities prior to having discussion with and approval of your SC.

APPENDIX A- Sample AARP Foundation Tax-Aide District Plan (Example)

- Based on direction set by AARP Foundation Tax-Aide national and state plans, identify objectives within the district and set specific objectives to meet state goals. List realistic, fiscally responsible strategies that will achieve those objectives.
 - Use input from the District Management Team (AC, CC, TC, TrC,) as well as LCs and Instructors to determine objectives and strategies.
 - Focus on a few key objectives to achieve the goals.
 - Consider implication of expansion plans based on ability to get and keep new volunteers, as well as equipment constraints.
 - District Plan should be communicated to all volunteers during district training.
 - District Plan should be agreed upon with the SC.
- Following are some *examples of goals, objectives and strategies*. (Some objectives and strategies use “X”s as placeholders for district appropriate numbers or percentages).

State Goal: Increase quality of returns and/or site operations:

District Objectives:

- All LCs aware of site guidelines.
 - Strategy: Include Site Quality Guidelines presentation in LC meeting before season starts.
- All volunteers receive the new Policy and Procedures training.
 - Strategy: Include Policy and Procedures presentation in district volunteer training.
- All EROs to receive new ERO training program.
 - Strategy: LCs or TC(s) to present as addendum to district training.
- Convert XX percent of the remaining paper sites to e-filing.

- Strategy: Have LCs develop plan to use non-computer counselors as Client Facilitators or Quality Reviewers.
- 100% usage of the IRS Intake, Interview, and QR form.
 - Strategy: Include exercises in district training.
 - Strategy: DC to audit sites during season to evaluate usage.
- 100% second Counselor quality review.
 - Strategy: Include exercises in district training.
 - Strategy: DC to audit sites during season to evaluate usage.
- 100% review of the completed tax return with the taxpayer.
 - Strategy: Include as role-play exercise in district training.
- XX percent e-filed returns in all sites.
 - Strategy: DC to evaluate site Activity Reports for compliance.

State Goal: Increase security:

District Objectives:

- True-crypt installed on all personal and AARP owned computers.
 - Strategy: TC controls distribution of TaxWise program and verifies use of Truecrypt.
- All volunteers aware of Confidentiality and Security of Taxpayer Data requirements.
 - Strategy: Include Confidentiality and Security presentation in district training.
- Networking X additional sites to minimize the number of computers with taxpayer data.
 - Strategy: TC/LC has specific sites in plan to install networks.
- Use TaxWise Online at X sites.
 - Strategy: TC/LC has specific sites in plan to install TWO.

State Goal: Increase value to taxpayer and AARP Foundation Tax-Aide:

District Objectives:

- Consolidate smaller sites into larger sites open multiple days to improve computer utilization.
 - Strategy: DC has plan for next season by end of current season.
- Add X new sites in areas with inadequate coverage and where demographics support need for a site(s).
 - Strategy: DC and/or LC(s) visit potential sites in summer and evaluate volunteer strength and equipment availability before committing to new site(s).
- Adding additional days and/or opening hours at X site(s) in district.
 - Strategy: DC to discuss with LCs at end-of-season meeting and determine potential.
- Recruit X new volunteers and X leaders in order to adequately staff existing sites and planned new or expanded sites.
 - Strategy: DC and LCs determine number of new volunteers needed based on expansion plans and develop media/communications plan accordingly.
 - Strategy: DC/CC media plan to include local media articles, local business, religious, government agency presentations, and public relations posters/flyers in strategic locations.

APPENDIX B - Sample LC Meeting Format/Content

- LC Meeting should be held shortly after state DC meeting.
- The only expenses that are authorized for this meeting are mileage for the participants...

Topic	Comments
Previous season site production report	Source: State Activity Report
Previous season site/volunteer awards	Source: ADS, SC
New recruit info for site	Source: PVC, SC
District Plan	Source: SC or DC. Use State Plan if no District Plan is available.
Site Quality Management to include: <ul style="list-style-type: none"> • Site checklist • Order blank • Site materials • Certified Counselor standards • Site security requirements • Activity Reporting, QR and ERO Log • Interview/Intake Sheet/Quality Review 	All of these topics are included in the the AARP Foundation Tax-Aide Site Quality Management Presentation. (Training Tab at www.aarp.org/tavolunteers). If no projector is available, DC can present hard copy of materials using this outline.
LC Expense Reporting responsibilities	District Plan and/or SMT training tab at www.aarp.org/tavolunteers
Activity Reporting System	https://volunteers.aarp.org
Extranet review	www.aarp.org/tavolunteers
ERO & CF Training	www.aarp.org/tavolunteers

APPENDIX C – District Coordinator and the District Management Team Calendar

Month	INITIATOR	LEADER	ACTIVITY
MAY	IRS	DC/TC	Return computers to depot by May 15
	TCS	DC/TC	Send updated inventory to TCS by May 1
	SC	DC	Summary of Volunteer Assessments to SC by May 1
	TCS	DC/TC	Retained data to TCS
	TCS	DC/TC	IRS & AARP Printer cartridge forecast
	TCS	DC	Site and Equipment Forecast Complete
	TCS	DC/TC	Send IRS Computer orders needs to TCS
JUNE			Take a break!
JULY			Take a break!
AUGUST	DEPOT	DC/TC	IRS computers begin to be shipped from depot
	SC	DC	Requests for recognition plaques and pins sent to SC
	ADS	DC	ADS sends draft leadership roster to DC August 20
SEPTEMBER	ADS	DC/LC	Submit Final Activity Reporting Period numbers via portal by September deadline
	IRS	DC/TRC	Order training materials for drop shipments
	ADS	DC	Send corrected leadership roster to ADS
	SC	DC	Submit end of fiscal year expense reports by September 30
OCTOBER	ADS	DC	ADS sends draft site roster to DC October 1
	IRS	DC/TC	Begin to send in software orders to IRS
	SC	SMT	Fall Planning Meeting
NOVEMBER	ADS	DC	Send corrected site roster to ADS
	IRS	DC	Send final site information to IRS
	TCS	DC/TC	Confirm printer cartridge order for season
DECEMBER	ADS	DC	ADS sends draft AVR to DC 12/01

	TRS	Instructors	Instructor Workshop
	TCS	TC	TC Workshop
JANUARY	ADS	DC	Final AVR with new and continuing volunteer information to ADS by 1/31
	ADS/IRS	DC	Certified Volunteer list to ADS and IRS by 1/31
FEBRUARY	IRS	DC/TC	Send PLA's for laptops and printers to IRS
	SC	DC	List of Counselors who may exceed "I" expense Threshold to SC
Feb/Mar/Apr	ADS	LC/DC	ACTIVITY REPORTING 1st activity reporting period ends 2/28 2nd activity reporting period ends 3/31 3rd activity reporting period ends 4/30 All site activity for a month must be entered into the Activity Reporting System within the first five days of the following month. Data not entered with the allowed time period may be entered at the end of the following month.
APRIL	National	LC	Send flat rate sheets to National Office or, optionally, use the Portal-based Reimbursement System for either flat rate or itemized mileage reimbursement. (See training material on the Extranet.)
	SC	DC	Submit expense statements for "I" expenses after April 15

APPENDIX D: Prospective Volunteer Referrals

WHO: DCs receive prospective volunteer referrals from various sources. Some of these are from other volunteers, the AARP Foundation Tax-Aide volunteer recruitment system, as well as from other agencies. The following are some tips on how to manage these referrals.

WHEN: Prospective volunteer referrals can occur at any time of the year; although it is generally focused September through January. It is critical to make contact in a timely manner no matter when during the year the referral occurs including during the tax season. This can be done by the AC, DC, CC, or LC. Ultimately it is the DC's responsibility to verify that contact has been initiated. The prospective volunteer will require nurturing from day one.

HOW: The most effective contact is made personally by phone. A personal phone call lets the prospective volunteer know that we value them. It is intended that the prospective volunteer will input their contact and experience information directly into the online volunteer recruitment system application at www.aarp.org/taxaide. The Recruitment System provides more complete information than is available from an informal referral and facilitates tracking the application process. By having prospective volunteers enter their own data it is likely to be correct and will reduce the administrative responsibilities of program leaders.

The Volunteer Recruitment System automatically sends emails to prospective volunteers at key steps of the application process. The System also allows evaluation of the recruitment and training processes. **The DC, working with the Prospective Volunteer Specialist, has the key role in preparing data for submission to the national volunteer database, VMIS.** The ADS no longer has the ability to add volunteers into VMIS as all new volunteer data is intended to be entered by the prospect through the volunteer application or by the DC or AC using the Add Volunteer Prospect function. While it is desirable to enter prospective volunteer data early in the recruitment process, it is acceptable to make the first computer entry when a decision is made about their first program assignment.

WHAT: It is important to share the following information with the prospective volunteer:

- AARP Foundation Tax-Aide's mission to provide free quality tax assistance to low and moderate income taxpayers with special attention to those age 60 and over
- AARP Foundation Tax-Aide/IRS training and certification requirements including training schedules
- Time commitment expectation of 40 hours for reimbursement

It is important to elicit the following information from the prospective volunteer, preferably by having the volunteer register at www.aarp.org/taxaide :

- Prospective volunteer's previous work/volunteer experience
- Prospective volunteer's tax background
- Prospective volunteer's computer experience
- Prospective volunteer's availability for training and volunteering

WHY: Recruitment and retention of volunteers is critical to the continued success of the AARP Tax-Aide program. It is of great importance that we emphasize this task. We should attempt to make a place for all volunteers who express an interest in the program. If a volunteer is unable to commit to certification, there are many other opportunities for them to volunteer in other AARP Tax-Aide roles. This is also a good time to begin to identify potential leaders. By identifying and training new leaders, we can reduce the workload on our current volunteers. Replacing a leader who wears several different leadership hats becomes a daunting task. We must also accommodate those who require a flexible work schedule. We encourage all districts to have at least one site open on weekends and/or evenings to accommodate the many volunteer prospects, and taxpayers, who are working during week days. The National Tax Training Committee will present options for training prospective volunteers to accommodate their work schedules. Research shows that those individuals who volunteer during their work years are also likely to volunteer in retirement .

APPENDIX E – Glossary is available in the *Operational Guidelines*

