

Standards of Professionalism for AARP Foundation Tax-Aide Volunteers

AARP Foundation's Tax-Aide program relies on its credibility for its success. Volunteer relationships with taxpayers at our sites are one of the largest measures of determining our credibility. We must provide a congenial atmosphere as stress-free for our taxpayers, who may already be anxious, as possible. To that end it is important for our volunteers to conduct themselves in a professional manner.

This document is intended to remind you of our professional standards and will cite some specific situations which we need to avoid, as well as others which we need to encourage. When our relations with our taxpayers become stressful, those encounters may reflect badly on our volunteers and also on our Tax-Aide program. Inappropriate behavior by our volunteers needs to be identified and promptly addressed. Our reputation and that of our program, are at risk.

At the same time, we recognize that our volunteers deserve to be treated with respect and work in a safe environment. **To that end you are encouraged to immediately involve your site coordinator any time you feel your respect has been diminished or your environment is unsafe.**

Standards of Professionalism

1. A hallmark of professionalism is to limit conversations to topics necessary to accurately complete an income tax return. Discussion of politics, race, nationality, gender, sexual orientation, gender identity, religion and the impact of income tax policies are inappropriate, since each of them can become an unnecessary source of conflict between volunteers and taxpayers.
2. Treat all taxpayers equally and with courtesy regardless of their race, nationality, gender, sexual orientation, gender identity or religion.
3. Follow AARP Foundation Tax-Aide policies at all times. Only prepare tax returns that are identified as being "In Scope," regardless of any additional knowledge of income tax law that you may have. **There are no exceptions to this policy** since if you do not follow this policy you will be working outside the protection of the Volunteer Protection Act and will be personally liable for your actions.
4. All income tax returns will receive a quality review by a second IRS-certified volunteer in the presence of the taxpayer. This is a required part of AARP Foundation Tax-Aide tax preparation process and there are no exceptions.
5. Do not discuss or share a taxpayer's information with anyone who does not "need to know" in order for you to complete the return.
6. When an issue arises regarding the completion of a taxpayer tax return that requires consulting another volunteer, please discuss the issue (without mentioning the taxpayer's name) away from the taxpayer and in a low voice; this ensures not only the protection of the taxpayer's privacy, but also that any difference of volunteer opinion is resolved in a way that sustains the taxpayer's confidence.
7. If a taxpayer should become angry, do your best to defuse the situation. If that is not successful, move the discussion to a quiet area, if possible, and immediately involve the site coordinator.
8. Provide appropriate needed assistance to those with a disability to ensure they feel welcome at your site and that their specific needs are accommodated. If requested assistance is not readily available, report the concern to your site coordinator who will involve the district coordinator and others as appropriate.
9. Do not provide the full name, address, phone or email information for any AARP Foundation Tax-Aide volunteer to a taxpayer or agency. Refer such inquiries to your site coordinator who will respond.