Partnership and Communications Guide

2006-2007
Table of Contents

<table>
<thead>
<tr>
<th>Chapter and Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. AARP Tax-Aide Mission and Organization</td>
<td>2</td>
</tr>
<tr>
<td>II. AARP Tax-Aide’s Customers</td>
<td>4</td>
</tr>
<tr>
<td>III. AARP Tax-Aide Volunteer Organizational Chart</td>
<td>5</td>
</tr>
<tr>
<td>IV. AARP: Vision, Mission Goals</td>
<td>6</td>
</tr>
<tr>
<td>V. Welcome to the Foundation and AARP</td>
<td>7</td>
</tr>
<tr>
<td>VI. AARP Foundation Programs and Services</td>
<td>8</td>
</tr>
<tr>
<td>VII. Key Relationships for the Tax-Aide PCS</td>
<td>10</td>
</tr>
<tr>
<td>VIII. Section One: General Information</td>
<td>11</td>
</tr>
<tr>
<td>IX. Section Two: Partnerships and Coalitions</td>
<td>15</td>
</tr>
<tr>
<td>X. Section Three: Non Grant Solicitations</td>
<td>19</td>
</tr>
<tr>
<td>XI. Section Four: Grant Writing</td>
<td>22</td>
</tr>
<tr>
<td>XII. Section Five: Working with your AARP State Office</td>
<td>25</td>
</tr>
<tr>
<td>XIII. Section Six: Partnership Checklist</td>
<td>26</td>
</tr>
<tr>
<td>XIV. Section Seven: Communications</td>
<td>28</td>
</tr>
<tr>
<td>XV. Section Eight: Publicizing AARP Tax-Aide at the Local Level</td>
<td>44</td>
</tr>
<tr>
<td>XVI. Section Nine: AARP Key Messages and Talking Points</td>
<td>45</td>
</tr>
<tr>
<td>XVII. Appendix: 2006-2007</td>
<td>49</td>
</tr>
<tr>
<td>* Appendix A PCS Specialist Job Description</td>
<td>50</td>
</tr>
<tr>
<td>* Appendix B CC Job Description</td>
<td>53</td>
</tr>
<tr>
<td>* Appendix C National Partnerships</td>
<td>55</td>
</tr>
<tr>
<td>* Appendix D Sample Solicitation Letter</td>
<td>60</td>
</tr>
<tr>
<td>* Appendix E Sample Thank You Letter</td>
<td>61</td>
</tr>
<tr>
<td>* Appendix F Partnership Press Release</td>
<td>62</td>
</tr>
<tr>
<td>* Appendix G Sample Proposal</td>
<td>63</td>
</tr>
<tr>
<td>* Appendix H Sample Press Releases</td>
<td>64</td>
</tr>
<tr>
<td>* Appendix I Sample Radio PSA</td>
<td>71</td>
</tr>
<tr>
<td>* Appendix J Television PSA</td>
<td>73</td>
</tr>
<tr>
<td>* Appendix K Frequently Asked Questions</td>
<td>75</td>
</tr>
<tr>
<td>* Appendix L Order Form</td>
<td>78</td>
</tr>
</tbody>
</table>
## AARP Tax-Aide Mission and Organization

**Mission:** To provide high quality free income tax assistance and tax form preparation to low- and middle-income taxpayers, with special attention to those age 60 and older.

<table>
<thead>
<tr>
<th>Who We Are</th>
<th>AARP Tax-Aide is the nation’s largest volunteer-run tax assistance and preparation service, preparing tax returns and answering tax questions free of charge. AARP Tax-Aide is a program of the AARP Foundation and is offered in conjunction with the IRS.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Where We Serve Our Taxpayers</td>
<td>Most taxpayers receive in-person assistance at one of the estimated 7,000 sites nationwide. Free electronic filing is offered at over 5,000 sites. Sites are located in malls, libraries, banks, senior centers, and other convenient facilities. We also provide shut-in service upon special request, whenever possible. Year-round tax assistance is offered online at <a href="http://www.aarp.org/taxaide">www.aarp.org/taxaide</a>. Quality reviewed answers are sent to taxpayers via email within a few business days.</td>
</tr>
<tr>
<td>How Many Volunteers Serve</td>
<td>Over 32,000 volunteers make up AARP Tax-Aide. Virtually all provide tax assistance, and 6,500 are also volunteer leaders.</td>
</tr>
<tr>
<td>Program Structure &amp; Administration</td>
<td>AARP Tax-Aide is a nationwide, volunteer-run program. Regional and state volunteer leaders share in setting policies while assuming most supervisory and operational responsibilities. Volunteer tax assistance Counselors provide all service-level tax assistance. Instructors provide tax training to Counselors.</td>
</tr>
<tr>
<td>Coordinator &amp; Specialist Roles</td>
<td>Coordinators recruit and supervise volunteers at all levels. Local Coordinators (LCs) ensure volunteer recruitment and training, volunteer certification, site creation, site compliance with program policy, database accuracy, activity reporting, and counselor expense reimbursement. District Coordinators (DCs) manage activity at the district level and recruit and supervise Local Coordinators. State Coordinators (SCs) oversee all state activities and set operation policies. Communications Coordinators (CCs) and Technology Coordinators (TCs) support their specialty interests at the local levels. Specialists support administration, partnerships and communications, technology, and training needs at the state level. Regional Coordinators (RCs) guide and supervise State Coordinators and serve on the National Leadership Team (NLT).</td>
</tr>
<tr>
<td>National Leadership Team &amp; National Office Staff</td>
<td>The National Leadership Team (NLT) of volunteer Regional Coordinators and National Committee Chairs develop and implement AARP Tax-Aide goals and objectives. National committees support the NLT in the areas of leadership, technology, and training. National Office staff coordinate program policies, maintain relationships with IRS and other key partners, provide administrative support to volunteer leaders, and collect/report administrative data and program impact.</td>
</tr>
<tr>
<td>Electronic Filing</td>
<td>AARP Tax-Aide offers free electronic filing at more than 5,000 sites nationwide using IRS provided tax preparation software.</td>
</tr>
<tr>
<td>Internet Tax Assistance</td>
<td>Since 1998, AARP Tax-Aide has had a 24-hour year-round Internet tax assistance service at its web site (<a href="http://www.aarp.org/taxaide">www.aarp.org/taxaide</a>). Taxpayers can pose questions...</td>
</tr>
</tbody>
</table>
online and get quality-reviewed answers back within a few business days. Interested volunteers with web access can sign up online at www.aarp.org/tavolunteers. There volunteers will find a link to the online tax assistance registration form.

Web Page Features
Located at www.aarp.org/taxaide, our website offers tax assistance, frequently asked tax questions and program information. Information on AARP Tax-Aide volunteer opportunities, which are available from February 1 to April 15 at individual program sites, is also available on the website.

Volunteer Extranet
Located at www.aarp.org/tavolunteers (case sensitive), this site offers information and tools to assist volunteers in performing the responsibilities of their AARP Tax-Aide position.

CyberTax E-Mail Newsletter
Any program volunteer with email is encouraged to receive CyberTax, a nationwide email newsletter containing periodic updates on the program, taxes, and IRS. Email your name, program position, and state to taxaide@aarp.org to join the CyberTax distribution list.

How to Volunteer Via Telephone and the Web
Interested persons call toll-free, 1-888-OURAARP (1-888-687-2277) and follow the prompts. Or at www.aarp.org/taxaide where an online volunteer recruitment form can be found. Volunteering can be done in either tax preparation assistance and/or leadership positions.

General volunteer position descriptions
Tax Assistance positions require training, successful completion of the IRS certification exam, and agreement to the IRS Standards of Conduct.

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.

Organizing the Geographic Territory
AARP Tax-Aide regional boundaries are predetermined by the AARP Tax-Aide National Office. State boundaries apply except for California, Florida, Illinois, Minnesota, New York, Ohio, Pennsylvania, and Texas. These heavily populated states are split, with multiple AARP Tax-Aide “states” within their geographic borders.

Within states, State Coordinators may organize into whatever geographic districts will provide the most efficient, equitable, or manageable division. A district is the responsibility of one District Coordinator. District Coordinators may divide their district into workable entities for assignment to Local Coordinators. In all cases, the boundaries should be clearly understood by all volunteers and delineated by the responsible Coordinator.
### AARP Tax-Aide’s Customers

During the 2006 tax season, from February 1- April 17, we served over 2,000,000 customers. Over the past 38 years, we have served more than 40 million customers.

**Who They Are (from 2005 survey)**

<table>
<thead>
<tr>
<th>Customer Age</th>
<th>10% 18-49</th>
<th>34% 70 – 79</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>8% 50-59</td>
<td>20% 80+</td>
</tr>
<tr>
<td></td>
<td>24% 60-69</td>
<td>4% no answer</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer Marital Status</th>
<th>36% Married</th>
<th>60% Not Married</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>61% Female</th>
<th>35% Male</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Race/Ethnicity (from 2004 survey)</th>
<th>White non-Hispanic</th>
<th>Hispanic</th>
<th>Native American</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>78%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>Black or African American</td>
<td>2%</td>
<td>1% Other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Household Income (Annual)</th>
<th>42% Under $20,000</th>
<th>18% $30,000-$49,000</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>25% $20,000-$29,000</td>
<td>4% $50,000 or more</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Repeat Customers</th>
<th>24% Once</th>
<th>38% Four+ Times</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>37% Two - Three Times</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Working Status</th>
<th>72% Retired</th>
<th>24% Not Retired</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Customers’ Proximity to Site</th>
<th>55% 0 - 3 miles</th>
<th>12% 6 - 9 miles</th>
<th>2% No answer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>20% 4 - 5 miles</td>
<td></td>
<td></td>
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### What They Think

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall quality of AARP Tax-Aide’s Service</td>
<td>81%</td>
<td>16%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Helpfulness of Volunteers</td>
<td>83%</td>
<td>13%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Tax Knowledge of Volunteers</td>
<td>74%</td>
<td>21%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Would they recommend AARP Tax-Aide to others?</td>
<td>94%</td>
<td>5%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Who would help them with their taxes if they didn’t use AARP Tax-Aide?</td>
<td>52%</td>
<td>35%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Pay for assistance</td>
<td></td>
<td></td>
<td></td>
<td>IRS</td>
</tr>
<tr>
<td>Self or friend</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Source: 2005 AARP Tax-Aide Customer Satisfaction Survey)
Volunteer Organization Chart AARP Tax-Aide

The reporting structure on this chart flows down from the Counselor, our top resource.

Electronic Return Originator (ERO) → Counselor (COU) → Client Facilitator (CF) → Local Coordinator (LC) → Communications Coordinator → Technology Coordinator (TC) → Instructor (INS) → District Coordinator (DC) → Prospective Volunteer Coordinator (PVC) → Technology Specialist (TCS) → Training Specialist (TRS) → Administrative Specialist (ADS) → Partnership/Communications Coordinator → State Coordinator (SC) → State Management Team (SMT) → Regional Coordinator (RC) → National Committee Chairs Technology, Training, → National Leadership Team (NLT) → AARP Tax-Aide (National Office Staff)

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

Partnership and Communications Guide
AARP

AARP is a nonprofit, nonpartisan membership organization dedicated to making life better for people 50 and over. We provide information and resources; engage in legislative, regulatory and legal advocacy; assist members in serving their communities; and offer a wide range of unique benefits, special products, and services for our members. These include *AARP The Magazine* published monthly, *AARP Bulletin*, our monthly newspaper; *AARP Segunda Juventud*, our quarterly newspaper in Spanish; NRTA Live & Learn, our quarterly newsletter for 50+ educators; our web site, [www.aarp.org](http://www.aarp.org). We have staffed offices in all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands.

Our State Offices are staffed with an AARP State Director and other employees who work in partnership with volunteers serving in roles such as:

* State President
* State Executive Council which includes:
  - State Director
  - State President
  - State Leadership Volunteer for Advocacy
  - State Leadership Volunteer for Community Service
  - State Leadership Volunteer for Communications
* State Volunteer Community Specialists
* AARP Chapters and NRTA units

This field structure creates a dynamic presence in every community and responds to the needs and interests of AARP members at the local level.

### AARP’s Vision, Mission, Goals

<table>
<thead>
<tr>
<th>AARP’s Vision</th>
<th>“A society in which everyone ages with dignity and purpose and in which AARP helps people fulfill their goals and dreams.”</th>
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<tbody>
<tr>
<td>AARP’s Mission</td>
<td>“AARP is dedicated to enhancing quality of life for all as we age. We lead positive social change and deliver value to members through information advocacy and service.”</td>
</tr>
</tbody>
</table>
| AARP’s Three Great Goals | AARP’s three great goals:
* To be the most successful and acknowledged organization in America for positive social change;
* To deliver on our promise to each AARP member;
* To be a world leader in global aging. |
Welcome to AARP Foundation and AARP!

The AARP Foundation and AARP have a long-standing commitment to community service. Through our collective efforts, millions of people are well served each year in communities across the country. AARP Foundation and AARP volunteers are the heart of our community service programs. In your community, you exemplify AARP’s commitment to helping others when offering services through the AARP Tax-Aide program.

AARP Foundation

The AARP Foundation is AARP’s affiliated 501(c)(3) charity for helping in communities like yours all across America. Founded in 1961, our mission is crucial: to build a society in which everyone ages with dignity, purpose and independence.

Foundation programs provide security, protection and empowerment for older persons in need. Low-income older workers receive job training and placement they need to re-join the workforce. Free tax preparation is provided for low-and middle-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, and 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 Programs and Services

**AARP Tax-Aide** volunteers annually provide free tax assistance and preparation service to approximately two million low and moderate income taxpayers, with special attention to those age 60 and older. Electronic filing and on-line tax assistance are also offered by the program. The program's funding sources include the Internal Revenue Service, AARP and private contributions. 1-888-AARPNOW (toll-free for sites and volunteer opportunities) or www.aarp.org/taxaide.

**AARP Senior Community Service Employment Program (SCSEP)** helps individuals age 55 and older with limited income gain the job skills and work experience necessary to transition to permanent employment. In addition, the program provides over 8 million hours of community service annually to local nonprofit agencies that assist with training program participants, enabling them to expand and provide key services. The program, funded by the US Department of Labor, is sponsored by the AARP Foundation in 76 communities in 22 states and Puerto Rico. www.aarp.org/scsep

**AARP Money Management Program** offers financial education materials for older adults and their caregivers plus daily money management services through volunteers to help older or disabled people who have difficulty budgeting, paying bills and keeping track of financial matters and who have no family or friends able to help. This program is funded by AARP. www.aarpmmp.org

**AARP Benefits Outreach Program** offers assistance to older people with low or moderate incomes to find public and private benefit programs for which they may be eligible, to help pay for prescription drugs, doctor's bills, groceries, heating bills, property taxes and more. One way this program offers assistance is by encouraging the use of a free website developed by the National Council on Aging: (www.benefitscheckup.org). The Benefits Outreach program is funded by AARP.

**AARP Foundation Grandparent Information Center (GIC)** provides information, referral and outreach for grandparents, policy makers, corporations and direct service providers, with a special emphasis on support for grandparents who provide care for their grandchildren. The program’s funding sources include AARP and private contributions. www.aarp.org/grandparent

**AARP Reverse Mortgage Education Project** is the nation’s leading source of independent consumer information and free counseling about reverse mortgages and less costly alternatives. It trains, tests and provides referrals to a national network of 75 non-profit counselors. The project's funding sources include the US Department of Housing and Urban Development (HUD) and AARP. www.hecresources.org

**AARP National Legal Training Project** trains lawyers and other advocates throughout the country in substantive law and advocacy skills to enhance their free and reduced fee services to older Americans, and conducts a “training of trainers” program to produce a cadre of elderlaw trainers who expand the reach of the program. The program’s funding sources include the US Administration on Aging, AARP and private contributions. www.aarp.org/ntltrpro

**AARP Technical Support for Legal Hotlines Project** provides technical assistance, training and materials to statewide legal hotlines that provide free legal advice and brief services by telephone to persons age 60 and over. The project provides similar assistance to help legal aid programs develop legal hotlines and continuously tests new methods for enhancing the productivity and quality of hotlines. The program’s funding sources include the US Administration on Aging, AARP and private contributions. www.legalhotlines.org

**AARP Elder Watch Projects** fight financial exploitation of older Americans in the states of Colorado and West Virginia through direct client assistance to help resolve consumer-based disputes, extensive outreach and education and collection of data. The program’s funding sources include the State’s Attorneys General Office, AARP and private contributions. www.aarpelderwatch.org

**AARP West Virginia Senior Medicare Patrol Project** is a consumer education project dedicated to preventing Medicare and Medicaid fraud, error, waste, and abuse. The program trains retired professionals to educate older West Virginians and their advocates on the identification and reporting of Medicare and Medicaid fraud, waste, and
abuse and provides a system to report suspected errors. The program’s funding sources include the US
Administration on Aging and AARP.

www.aarp.org/foundation/wsmp

**Partners for Independence: Restoring Hope to Seniors** is a program to recruit boomer volunteers to provide
critically needed services to victims of the 2005 hurricanes. The Foundation is partnering with AARP state offices in
Louisiana, Mississippi, and Texas as well as with Faith in Action and Rebuilding Together in this initiative. The
program is funded by a grant from the Corporation for National and Community Service and private contributions.

**AARP Consumer Fraud Prevention Program** works with qualified not-for-profit organizations whose volunteers call
victims and potential victims of telemarketing and other frauds to inform and educate older people, with a focus on
preventing victimization or further victimization.

**The AARP Foundation Women’s Leadership Circle** leverages the philanthropic power and passion of women to
improve and enhance women’s lives as they grow older. The AARP Foundation Women’s Leadership Circle (WLC)
provides women with the opportunity to explore the image and language of aging; to define paths to economic
security and to encourage healthy lifestyles as we lead a national movement to raise awareness of issues faced by
women as they age.

**AARP Foundation Litigation** (AFL) defends and expands the rights of older Americans by representing them in
significant court cases and by writing friend-of-the-court (amicus) briefs on behalf of AARP. (AFL) is involved in
litigation before state and federal appellate courts, state supreme courts, and the U.S. Supreme Court. AARP
Foundation Litigation addresses legal issues that affect the daily lives of older persons such as health and long term
care, consumer protection including predatory lending, age and disability discrimination in employment, pensions and
other retiree benefits.

**AARP Foundation Disaster Relief and Recovery Fund: Making a Difference**
The AARP Foundation continues to make a difference on the Gulf Coast region with disaster relief and recovery
grants to over 40 local agencies. These agencies are serving older victims of hurricanes who have been displaced, or
have health, legal or other needs. Grantees include state and local organizations as well as national organizations
such as Rebuilding Together, Boat People SOS, and the National Housing Law Project. Grants made to these
agencies are helping with immediate, transitional and longer term needs. As the Gulf Coast begins to recover and
rebuild, the AARP Foundation will continue to support state, local and national agencies with grants made from its
Disaster Relief and Recovery Fund. In total, the Foundation has donated nearly $1.6 million to organizations
operating on the ground in Alabama, Louisiana, Mississippi and Texas.

**AARP Foundation Development**
Donating to the AARP Foundation lets donors have “the power to make it better”™ by strengthening and
supporting the Foundation’s efforts to help people over 50 lead lives of independence, dignity and purpose. There
are a variety of giving options including outright gifts of cash or appreciated securities, bequests, real and personal
property, and through charitable gift annuities and charitable remainder trusts.

As a charitable organization, gifts to the AARP Foundation are tax deductible, and they can make a positive
difference in the quality of life of our most vulnerable elderly in society.

For More Information on AARP Foundation Programs and Services:

WEB: You may visit us on the web at www.aarp.org/foundation

MAIL: You may write us at:
    AARP Foundation
    601 E Street, NW
    Washington, DC 20049

PHONE: Or you can call us at 1-888-OUR-AARP (687-2277)
Key Relationships for the AARP Tax-Aide Partnerships 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 Communications Staff and Volunteers.** There is a staff member responsible for overall state communications within each State Office. Contact the designated AARP communications lead (Communication Representative, Assoc. State Director, or designated liaison) to discuss your communications needs and to determine others with whom you should work with in 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 Tax-Aide National Office.** Communication with the national office is a key resource for the PCS. Both key 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

Partnerships and Communication Specialist (PCS)

The Partnerships and Communications Specialist (PCS) works with the SC and the SMT to implement and maintain partnerships, program publicity and communication activities at the state (sub-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 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 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.
- Ensures that all state-level program materials (internal and external) contain boilerplate language.
- Ensures that sites are identified with proper AARP and AARP 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 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 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 state wide 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 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 Tax-Aide National office. Contact this office to bounce ideas off people who experience daily contact with numerous other PCS’s and also are working to develop national publicity and partnership efforts.

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

**LeeAnn Steinberg**
Assistant National Director
1-800-424-2277 ext 2522
202-434-2522
Email: lsteinberg@aarp.org
Fax: 202-434-6026

**Lynnette Lee-Villanueva**
Assistant National Director
1-800-424-2277, ext 6001
202-434-6001
Email:llee@aarp.org
Fax: 202-434-6026
**Interface with State Management Team (SMT)**

As the PCS you have three very 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 the 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 Tax-Aide. To include communication articles and publications.

**Representative Schedule**

The workload of the PCS position is heaviest during nontax season. Prior to tax season you are heavily involved in recruiting efforts and new site partnerships. You are actually a little 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.
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<tr>
<th>AUGUST</th>
<th>SEPTEMBER</th>
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<tr>
<td>• Meet with the SC and SMT following training to discuss partnerships 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.</td>
<td>• Begin intensive volunteer recruitment campaign as outlined in the state communications plan.</td>
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<td>• Confer with your AARP State Director and/or Communications Rep about your communications goals for the year and solicit help and ideas.</td>
<td>• Assist DC in recruiting CCs.</td>
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<td>• Assess your state volunteer recruitment needs within your states with the DC and in conjunction with the SC.</td>
<td>• Review last years efforts for changes to this years plan</td>
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<td>• Obtain up-to-date media lists</td>
<td>• Meet with AARP State Director and AARP Tax-Aide State Coordinator to ensure synergy</td>
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<tr>
<td>• Develop relationships with outside partners.</td>
<td>• Develop State Communications Plan</td>
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<tr>
<td>• Develop state communications plan and submit final copy to the SC, SMT, AARP State Director, and CCs.</td>
<td>• Canvas District Communications Plan for promotional needs</td>
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<th>OCTOBER</th>
<th>NOVEMBER/DECEMBER</th>
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<td>• 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 Tax-Aide boilerplate language and logo on all materials and brand all sites.</td>
<td>• Monitor results of recruitment plan and adjust as necessary</td>
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<tr>
<td>• Modify plan as result of SMT feedback</td>
<td>• Support District Coordinators and communications to develop advertising</td>
</tr>
<tr>
<td>• Implement plan through DC Recruitment effort</td>
<td>• Attend Training</td>
</tr>
<tr>
<td>• Attend District Meetings to review and help in recruitment and advertising and to train CCs or their equivalent in partnerships, recruitment and publicity</td>
<td>• Begin preparation for program promotion campaign (promote service and location of sites).</td>
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<tr>
<td>• Continue recruitment campaign.</td>
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<th>JANUARY</th>
<th>FEBRUARY</th>
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<tr>
<td>• Review results as known on promotion and recruitment and crisis react if required</td>
<td>• Assist CCs or designee in publicizing local programs.</td>
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<tr>
<td>• Assist CCs or their equivalent in publicizing program at the local level.</td>
<td>• 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.</td>
</tr>
<tr>
<td>• Attempt to get state coverage for AARP Tax-Aide through either state wide media releases or in conjunction with your respective AARP State Office Communications team member or Assistant Director.</td>
<td>• Begin to collect names and organizations that are supporting our program</td>
</tr>
<tr>
<td>• Thank you letters to helpful media contacts.</td>
<td>• Analyze plans and operations for next year corrections</td>
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<tr>
<td>• Meet with State AARP for promotion at state and local level</td>
<td>• Monitor the activities at new sites for assistance</td>
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<td></td>
<td>• Support DC</td>
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<td>• Meet with State AARP for promotion at state and local level</td>
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<th>APRIL</th>
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<td>• 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.</td>
<td>• Meet with SC and District Coordinators to evaluate effectiveness of the state communications plan and begin brainstorming for next season.</td>
</tr>
<tr>
<td>• Assist DC’s and or CCs or their equivalent in promoting the program at the local level</td>
<td>• Continue to promote year-round tax counseling service available via the web at <a href="http://www.aarp.org/taxaide">www.aarp.org/taxaide</a></td>
</tr>
<tr>
<td>• Promotion for tax deadline filing assistance</td>
<td>• Prepare report to State Coordinator on pluses and areas to improve for area</td>
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<tr>
<td>• Write thank-you letters to helpful media contacts.</td>
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<tr>
<th>MAY</th>
<th>JUNE/JULY</th>
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<tr>
<td>• Receive appointment letter</td>
<td>• Attend SMT National Training during your first year. (Your State Coordinator will provide information on when and where)</td>
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Section Two

Partnerships and Coalitions

A Partnership is formed between two groups or organizations that receive mutual benefit. (Appendix C)

A Coalition is formed among more than two groups or organizations that receive mutual benefits. So the difference for this position is more of the number of members than the role and mission of the partnership.

AARP Tax-Aide Partnership and Coalition Objectives

- To acquire in-kind donations and support resources for AARP Tax-Aide sites locally and/or nationwide
- To increase the AARP Tax-Aide volunteer cadre
- To increase the number of AARP Tax-Aide sites or replace sites with ones that allow us to use their computer equipment or other support
- To grow the AARP Tax-Aide customer base
- To pursue partnerships for recruitment of customers and volunteers that may bring diversity as it relates to race, gender, and age

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 Tax-Aide leaders consider the potential for positive outcome when deciding whether to join the effort. The AARP 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.

How Partnerships and Coalitions can benefit from AARP Tax-Aide

- AARP Tax-Aide can bring expertise because it is the largest free, volunteer run tax assistance and preparation service with over thirty-eight years of experience.
- AARP Tax-Aide has a presence in over 7000 sites across the country—therefore; AARP Tax-Aide brings an existing infrastructure.
- AARP Tax-Aide has the largest rural infrastructure experience, absent in many coalition groups.
- AARP Tax-Aide has a train-the-trainer model that can assist other groups.

What Benefits Does a Corporation 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 Tax-Aide is a program of the AARP Foundation, 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. Your librarian 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 suggest 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
- Community Centers, particularly those sponsoring seniors programs
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 your 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 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 counsel, help organize or make appointments
- Many corporations, businesses and community groups operate community participation programs. Ask to include AARP Tax-Aide in their volunteer opportunities section
- Community groups and business partners may sponsor recognition events for volunteers

Sites
- Locations where 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 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’s) from radio stations and billboard companies
- Distribution of promotional materials on the AARP 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 Tax-Aide; this is not fee-for-service provided, but a contribution to a good program
- Foundation or grant monies and/or equipment
Section Three

Non Grant solicitations

The Partner Proposal Presentation

Cultivating partnerships, donations, and similar sponsorships is challenging. Many other deserving organizations are soliciting support for 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, 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 has a proposal and it says 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 for coffee or to visit you at the AARP Tax Aide 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 Tax-Aide Program and a brochure about AARP Tax-Aide.

- Write about the AARP Tax-Aide program and the customers you serve in your state. Reference AARP 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 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 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 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 D14831
- An English “Get Free Help Brochure” D13401
- A Spanish “Get Free Help Brochure” D16719
- AARP Community Service Program Sheet D17940
- Your business card if you have one

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 to not become a pest, but also do not be forgotten. This is probably the hardest part of this process and it can not be taught. This is your relationship with your potential partner, learn to listen and follow his lead.

You were granted your request! Now, consider to:
- Celebrate- putting partnerships 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 Tax-Aide program to increase awareness among potential partners of the value of AARP Tax-Aide programs in their community.
- Recognize partners as possible, 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.

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.
Section Four
Grant Writing

*Note:* All grants must be reviewed by the National Office Staff, prior to submission. Please send to the Assistant National Director for review. Fax 202-434-6026 or mail to AARP Tax-Aide, 601 E Street, NW, Washington, DC 20049 (This is important for AARP/AARP Tax-Aide from a coordination and legal standpoint.) Before a grant or resource commitment is made the SC and RC should be made formally 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 young children’s education then it is not likely that AARP Tax-Aide has much of a chance to realistically participate. But many organizations have community service grants and help for the elderly. Look at the requirements and decide if you feel your request would clearly fit into the grantors requirements.

1. Research to find out who offers monies or donations. This can be done in the library, networking, or searching the web.
2. Discuss with your SMT.
3. 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 he does use it or do not waste the time to put together the proposal
4. Either follow application guidelines or 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
- 3 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 (your name) will call within three weeks to see if you have any questions”
• Coordinated by the SC and RC
• Signed by the National Program Director, Bonnie Speedy and coordinated by the Assistant National Director.

Letter of Inquiry- 2-4 pages long
1. Write a summary first- restate total budget request
2. Write an introduction- credibility statement
3. Write a problem statement
4. Write program objectives
5. Write methods
6. Write evaluation
7. Write how you will find future funding
8. End actively
9. Routed through the SC and RC
10. Signed by the National Program Director, Bonnie Speedy (send entire package to the National Partnership Coordinator at 1 800 424-2277 ext 6001 or 202-434-6001.

Letter of inquiry or grant for equipment (2-3 pages)
1. Write a strong credibility statement
2. Write about why the community needs the equipment (why e-filing is so important.)
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
Therefore, cover letter plus letter of inquiry in total should be 3-5 pages.

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 Tax-Aide’s statistics and mission)
• You are organized
• You are knowledgeable and credible

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

AARP Tax-Aide is a free, volunteer-run, tax assistance and preparation service available to taxpayers at low- and middle- income levels, with special attention given to people age 60 and over. AARP Tax-Aide is a program of the AARP Foundation, offered in conjunction with the Internal Revenue
Service (IRS). Over 32,000 AARP Tax-Aide volunteers trained in cooperation with the IRS helped over 2 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 re-join the workforce. Free tax assistance and preparation is provided for low- and middle-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 5

Working with your AARP State Office

The relationship with the state offices has changed significantly over the last two to three years. Now each State Office should have a point of contact to support and work with AARP 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 to include computers and administrative support
- Some states have even run and or maintained web sites and publications for AARP Tax-Aide

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 who you should first meet with 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 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 billboards
- Supplying name badges, t-shirts, trinkets, and other things that volunteers might like
- Opening up an AARP 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
- Computers
Section 6
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
- Be sure also to 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 Tax-Aide program
- Specify the benefits your sponsor will receive as an AARP Tax-Aide partner
- Collect the AARP 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 the range of sponsorship opportunities as one of many may interest the partner.

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 the Assistant National Director
Communications

Communications is a major part of your job and the part you may need the majority of assistance. State wide media blitzes run from a fax machine or from a computer, while sometimes effective, are usually not productive for AARP Tax-Aide. Your local news outlets and the few news outlets with state wide coverage are more responsive to a local person meeting or pitching the article. Therefore, while it is good to have a list or all media outlets in your state from the various internet search engines, it is usually better to give guidance in the form of sample state oriented press releases to the district coordinators. Your assistance with the local communications coordinator can get them to the local papers.

Previous AARP Tax-Aide experience shows that a state wide media release usually is better handled from your coordination with your AARP State Office professional communications staff person. However, this is not always the fact especially if you can find a working reporter or TV person in your volunteer base. With this normally being the exception we will talk more about how to develop a district level program for media releases. Remember the recruitment of Communications Coordinators will make your job much easier and probably increase the penetration of your message into the targeted audience.

Starting your program

With luck you are replacing an existing PCS so you have that start point. However, that may not always be the case, so we will discuss how to get a media program working.

Getting Started: You need to meet with the local DC’s and even LC’s as well as the SMT to establish what may be working at the local level. You will be surprised at how effective DC’s are at advertising their program and this information is the start of your state wide program. Look for the methods that have worked in your state and remember that because in district x this works well, district y may have a different editorial policy. Obviously the state office with its state wide volunteers can be a big assistance here and the communications staff member should be able to help you. The primary things you are looking for is print, radio and TV media programs that work and how you can make the program work effectively state wide.

An existing program: No program is perfect. If you have inherited an existing program, discuss with the SMT as well as the DC’s to see if they want more help and where they have been having problems getting penetration. With this information meet with the AARP State Office and the State communications staff member to review and look at possible improvements in the state plan. Brief this plan to the State Coordinator and prepare the materials for the DC’s and the Communications coordinators to use in your media program.

Types of materials:
AARP Tax-Aide Testimonials
Customer and volunteer testimonials can be an effective way to promote the AARP Tax-Aide program. Utilizing testimonials in state and local promotional materials can be an effective way of putting a human face on our messages. Below are sample testimonials. Consider going into your community to gather testimonials from customers and fellow volunteers.

Customer Testimonials:

• “Thank you. This service is much appreciated by seniors who need the program. The AARP Tax-Aide counselor was most cordial and helpful. He is a gem.”
• “Thanks again for the quick and timely response. It feels good to be able to help my grandparents out, so I wanted to be sure that I was doing the right things for them.”

Volunteer Testimonial:

• “I had to take the time to write you to thank you for allowing me to become an AARP Tax-Aide volunteer. I was a bit nervous when I finished the training, but after hearing the gratitude expressed from my first “tax customer”. I knew I had chosen the right volunteer opportunity.”

Site Testimonials:

• “This year we opened our grocery store to host an AARP 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 Tax-Aide truly is wonderful. Our patrons can look for books while they wait for their tax preparation time. And the professionalism of your volunteers is exemplary. Thanks.”

Letters to the Editor

• Be brief. Letters to the editor should be one page or less. The shorter your letter, the better your chances of getting important points printed and not having your letter edited because of space shortages. (250 words or less.)
• Open the letter with a thought-provoking or interesting sentence to entice the reader to keep reading.
• Be concise and to the point. Use simple language. 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. Most newspapers will not print a letter from an unknown author. Also include your address and phone number. Only your name and town will be published.
• Call the newspaper and ask whom to address and where to send your “Letter to the Editor.”
• Never use libelous words. Ex: liar. If someone has written an article full of factual errors, point out the errors; do not personally attack the writer.

Press Releases

News organizations get hundreds of press releases every day. Make sure you only send releases when it’s appropriate. Press releases lacking newsworthy information could end up in the trash and the media may not pay attention to the next release you send. When possible it is always good to establish a working relationship with the appropriate person on the newspaper staff. AARP Tax Aide has a selection of press releases that you can personalize for your area. (Appendix H Sample Press Releases)

Remember, a newspaper publishes 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, it doesn’t mean the media will be interested. Ex: meetings. Unless you have a “hit” topic or a well-known newsmaker speaking, the information might not be published.

AARP Tax-Aide requires the following boilerplate be included in all formal press releases.

AARP Foundation boilerplate: 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.

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
Important: name of contact person and phone number at the top right hand corner. Always let the reporter know how to reach the contact person quickly. If the media can’t contact someone quickly, you could miss an opportunity and the hard work you put into the press release will be wasted.

- Keep the 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. Press releases without a date often get thrown away because the media is not sure when the release was written and sent.
- 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 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.
- Address your press release to:

  TV: Assignment Editor
      Reporter assigned to cover subject matter.

  RADIO: News Director
         Assignment Editor

  NEWSPAPERS:

  Daily: City Editor
         Other editor whose section may cover the subject matter.
         Reporter assigned to cover subject matter.

  Weekly: Editor

  WIRES:
  AP/UPI/Reuters News Editor
  Day Book Editor
**Important:** If sending more than one release to a news organization, let them know who has been copied on the press release.

Mail or fax your press release at least one week prior to the event so that assignment editors and section editors can put your event on the schedule. Call a day before the event to see if the assignment editor or section editor received your release or fax. DO NOT CALL TO ANNOUNCE THAT YOU ARE SENDING A FAX. If the assignment editor or editor does not seem interested in your release or statement, thank him/her for the time and hang-up.

Below is a discussion of the roles of various newspaper people and how you may be able to use them to further your efforts.

**DAILY NEWSPAPERS**

**PUBLISHER**
- Oversees the entire newspaper. Almost always is a businessperson rather than a newsperson.

**EDITOR**
- Top of the news operation. Sometimes called editor-in-chief. Largely an administrative job.

**MANAGING EDITOR**
- Oversees all different department editors.

**METRO/CITY EDITOR**
- 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.
- Know this person by name.

**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. 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.

**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 same subject matter (beat).
- Other reporters are called “General Assignment”. They are available to cover breaking stories on any subject and take assignments from the editors.
- Reporters do not write headlines.

IMPORTANT

- *If sending a press release to more than one editor, make sure you tell the editors involved so you don’t have different departments working on the same story.*
- *At Large Newspapers:*
  - The editorial page editor may handle the staff-written editorial pieces.
  - The Op-ed page editor handles Op-ed/opinion pieces written outside the newspaper.
  - A special department called “Viewpoints” or “Letters to the Editor” may handle letters sent in by citizens.
- *At Medium and Small Newspapers:*
  - The editorial page editor may handle staff articles, Op-eds and “Letters to the Editor”.
  - Different papers require editorial articles to be sent to different people, call before sending.

WEEKLY NEWSPAPERS

*Smaller staffs than daily papers, but may have more interest in your articles*

PUBLISHER

- May own the paper.

EDITOR

- Oversees the news operation of the paper.
- Send press releases to this person.

REPORTERS

- Usually they cover several “beats” plus “general assignments”.
- Send press releases to the appropriate reporter.

HINTS IN WORKING WITH NEWSPAPERS

- Use an internet search engine (Google, Yahoo, etc) and perform a search of newspapers within your state. Start by entering your state then newspapers. One 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 local paper, note different sections of the paper and look for editors’ name(s).
- Send press releases to city editor or editor over the appropriate section of the paper, such as political editor, business editor, lifestyle editor, etc. When sending a press release to more than one editor, make sure you inform the editors involved.
• You can also 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 in a newsroom.
• Tell editors and reporters what they are likely to see at the event. Suggest photo opportunities.
• Mail or fax a press release at least one to two weeks before the event. Check for correct spelling of the name to whom you’re addressing the release. Make sure you have the right mailing address, phone and fax numbers.
• Call the city editor or other section editor to see whether a press release has been received. If received, don’t call again. If not, send it again.
• Remember, it’s impossible for an editor or reporter to promise to be at an event. So don’t ask for a commitment, just say “Hope you can be there.”
• 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. Don’t avoid the media.
• Many print reporters will do their interviews over the phone. The newspaper’s 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. Always keep your word and call back at the promised time.
• If a reporter calls you with an exclusive, honor it. Don’t tip off another news organization. However, if 10 minutes later another reporter contacts you on the same subject, answer the questions fully. You need not worry about protecting what the first reporter thought was an exclusive.
• 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.
• Call and 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.
• Never call reporters when their copy is due. They are on deadline. Most print reporters have one deadline. It may be daily, weekly, or monthly.
• Deadlines:
  • Morning papers: late afternoon
  • Evening papers: late morning
  • Weekly/Bi-Weekly: May have deadlines several days in advance.
• Exception to calling on deadline: Breaking News. If breaking news happens…call. Newspapers want to cover it. But, due to printing time, it may not make the next edition.
• 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.

TIPS FOR A GOOD NEWSPAPER 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 newspaper 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.
• If interviewed, remember quotable comments may not be confined to the actual interview. Reporters may use an offhand remark made while waiting for an elevator or small talk at the beginning of a telephone conversation. Be alert.
• Know that a reporter may report on more than just your words. In an article, a reporter may comment on your posture, appearance, facial expressions and reaction time.
• Relax and be yourself. It’s important to act natural.
• 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.
• Have in mind a key phrase you would like to see in print and repeat it in the interview.
• Avoid “Yes or No” answers…but don’t ramble. Have in mind a key phrase you would like to see in print.
• 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 materials and support information. Supply charts and graphs when possible.
• 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 don’t know” or “I can’t answer that at this time.” 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.

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.
- Call the editorial page editor to ask about setting up a meeting. Be prepared in 60-90 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. Old news is stale news.
- Be prepared. 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.
- If an editorial board meeting takes place, send a thank you note for their interest.
- 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.

Working with Radio and TV

Working with radio and TV very closely follows the same guidelines as with working with press agencies. 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 market as these managers are always looking for new and interesting guests.
(Appendix I Sample Radio PSA) (Appendix J Sample TV PSA)

WHO’S WHO IN RADIO and TV
NEWS DIRECTOR
- In charge of the day-to-day news operation.
- Runs news meetings.
- Discusses with newsroom staff what stories should be covered.
- Send press releases to this person.
- Know this person by name.

ASSIGNMENT EDITOR
- Assigns stories to reporters.
- Keeps a list of story ideas.
- Always looking for story ideas.
- Address press releases to this person.
- Know this person by name.

REPORTER
- Rarely leaves newsroom to cover stories.
- 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.

EXECUTIVE PRODUCER
- Decides with other staff what topics to cover on talk radio shows and who will be guests.
- 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.
- When talk show host is on-air, producer screens calls before the host puts callers on the radio.

RADIO and TV Helpful Hints
- Use an internet search engine (Google, Yahoo, etc) and perform a search of radio and TV stations within your state. Start by entering your state than radio and/or television. A good television 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.
- Send press releases to news director and assignment editor. You can also pitch stories to reporters. Make sure you tell them when pitching the same idea to others in the newsroom.
• Mail or fax a press release at least one to two weeks before the event. Check for correct spelling of name to whom you are addressing the release. Make sure you have the right address, phone and fax numbers.
• Call assignment editor once to see if a press release has been received. If received, don’t call again. If not, send it again.
• Remember it’s impossible for anyone in a newsroom to promise coverage, so don’t ask.
• Establish yourself as a source of information. Occasionally suggest ideas that may appeal to reporters but may not necessarily promote your cause.
• A newsworthy radio story should:
  • Be timely, have immediacy. Old news is stale news.
  • Be compelling, have human interest.
  • Have importance to the community.
  • Involve of people in community
  • Tie-in with other current local, state or national events.
  • Provide unusual or important information.
  • Hold up under scrutiny. Facts to back it up.
• 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. Don’t avoid the media.
• 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. Always keep your word and call back at the promised time.
• If a reporter calls you with an exclusive, honor it. Don’t tip off another news organization. However, if 10 minutes later another reporter contacts you on the same subject, answer the questions fully. You need not worry about protecting what the first reporter thought was an exclusive.
• Call and ask, “When are your deadlines?” It shows respect for the news organization and is vital information you need to know. Radio news has constant deadlines, be sensitive and aware.
• Begin calls with “Are you on deadline?” If yes, ask for a good time to call back.
• Create a media list. Every news director, assignment editor, producer 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.

**Tips for a Good Radio and Television Interview**

• Never assume the camera or microphone is off! You can’t always tell when the camera is rolling.
• Know the program. If possible watch the show before you appear. Watch the interviewer and format.
• 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.
• Relax but be energetic. It’s important to act natural.
• Know your subject matter. You don’t need notes, unless it’s for dates and times.
• Anticipate questions.
• Answer questions thoughtful 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.
• TV reporters are looking for 15-30 second sounds bites. Use quotable language. Answer with interesting language to grab a viewer’s attention but concisely so you don’t get edited.
• Avoid “Yes or No” answers…but don’t ramble. Have in mind a key phrase you would like to see on the air.
• 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. Don’t over use statistics in on-air interviews.
• Give reporter materials and support information. Supply charts and graphs when possible.
• 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 don’t know” or “I can’t answer that at this time.” 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 it on the six o’clock news.
• 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.
WIRE SERVICES

A great way to get your message out and your event publicized. Contact your state’s wire service bureau. The main wire services are The Associated Press, known as AP and the United Press International, known as UPU and Reuters.

News organizations across the country subscribe to wire services. Many news stations and newspapers get wire stories off their computers. Wire services provide news organizations with breaking news and information through news stories and calendars. Wire services can either cover events with their own reporters or gather stories from other news organizations to place on the wire.

Wire services are very important because when they write or pick up another reporter’s story it can be sent to dozens of news outlets across the state. But remember, just because a story appears on the wire, it doesn’t mean that news organizations are obligated to do anything with it.

When sending a press release to your state’s wire service bureau, address it to the “news editor.” Send your news information of an upcoming event to the calendar section of the wire so other news organizations can see what’s coming up.

If you have already sent out releases in a city, sending notification of an event to the calendar section is a great way to remind news organizations and increase your odds of getting coverage.

Send calendar information to your state’s Wire Service Bureau. Address information to the “Day Book Editor.”

MEDIA ADVISORY

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

Use organization letterhead or plain white paper.
List media advisory on page.
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.
Write clearly and in a straightforward style. Check spelling, grammar, and punctuation carefully.

- Address your Media Advisory to:

  TV: Assignment Editor
      Reporter assigned to cover subject matter.

  RADIO: News Director
         Assignment Editor

  NEWSPAPERS: Daily and Weekly: Editor

  **Important:** If sending more than one advisory to a news organization let them know who has been copied on the media advisory.

  Mail or fax your advisory 4 to 7 days prior to the event so that assignment editors and editors can put your event on the schedule. Call to see if the assignment editor or editor received your release or fax. DO NOT CALL TO ANNOUNCE THAT YOU ARE SENDING A FAX. If the assignment editor or editor does not seem interested in your advisory, thank him/her for the time and hang-up.
**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 Communication designee.

Messages must meet specifications. All messages must be no longer than 8 lines and 40 characters per line including spaces.

The following ink jet messages previously appeared in *AARP The Magazine* and *the Bulletin*.
Promotion Example:
AARP Tax-Aide is the nation’s largest, free, volunteer tax assistance and preparation service. It helps taxpayers with low-and middle income, with special attention to those 60 and older. Call 1-888-227-7669 or visit www.aarp.org/taxaide to locate a site. AARP Tax-Aide is a program of the AARP Foundation, in conjunction with the IRS.

Recruitment Example:
AARP Tax-Aide needs volunteers to assist with tax preparation. You receive free IRS-certified tax training and get to help others. Counselors and leadership positions available. Call 1-888-687-2277 or visit us at www.aarp.org/taxaide. AARP Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

2006 - 2007 Inkjet Messages Deadlines for AARP The Magazine are:

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<th>Issue</th>
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<tr>
<td>January-February 07</td>
<td>9/15/06</td>
</tr>
<tr>
<td>March-April 07</td>
<td>11/8/06</td>
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<td>7/13/06</td>
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<tr>
<td>January/February 08</td>
<td>9/14/07</td>
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* Please note: No message can appear in the same area for more than two consecutive issues
SECTION 8

Publicizing AARP Tax-Aide at the Local Level

There are numerous ways to publicize AARP 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. (Material Order Form Appendix K)

- Read your local newspapers for times, dates and locations of county fairs, parades, civic celebrations, volunteer drives and social service fairs. Attend and pass out program information or ask to have an AARP Tax-Aide table available.

- Visit your local senior centers, nursing homes, hospitals and churches and ask them to place AARP Tax-Aide articles in their newsletters and bulletins.

- Ask your local site sponsors to place AARP 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 Tax-Aide in conjunction with other AARP programs and services and in AARP publications such as AARP The Magazine and The 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 Tax-Aide during tax season.

- Attend networking events for professionals serving diverse groups and seniors, and ask to speak about AARP Tax-Aide.

- Contact local care giving organizations and the Area Agency on Aging in your region to inform them about AARP Tax-Aide.

List AARP 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 9

AARP Key Messages and Talking Points

AARP Tax-Aide’s Key Messages

The official description of the AARP Tax-Aide program is, “AARP Tax-Aide is the nation’s largest, free volunteer-run tax assistance and preparation service available to taxpayers with low-and middle-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 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 Tax-Aide has a 98% accuracy rate on prepared returns but errors can occur. The taxpayer, not the program, retains sole responsibility for his/her return.

• **TAXPAYERS WITH LOW- AND MIDDLE- 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 Tax-Aide’s 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 Tax-Aide promotional materials must include the program’s tagline, “AARP Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.”

**AARP boilerplate:** AARP is a nonprofit, nonpartisan membership organization dedicated to making life better for people 50 and over. We provide information and resources; engage in legislative, regulatory and legal advocacy; assist members in serving their communities; and offer a wide range of unique benefits, special products, and services for our members. These include AARP The Magazine, published bimonthly; AARP Bulletin our monthly newspaper; AARP Segunda Juventud, our quarterly newspaper in Spanish; NRTA Live and Learn, our quarterly newsletter for 50+ educators; and our Web site, www.aarp.org. We have staffed offices in all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands.
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 Tax-Aide Talking Points

AARP Tax-Aide Basics

AARP Tax-Aide is the nation’s largest, free volunteer-run tax counseling and preparation service offered to taxpayers with middle and low-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 Tax-Aide is administered by the AARP Foundation.

Last year, over 32,000 AARP Tax-Aide volunteers helped more than 2 million taxpayers file their federal, state and local returns.

AARP 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 Tax-Aide

AARP 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 Tax-Aide transferred the federal funds for and the administration of the AARP Tax-Aide program to the AARP Foundation in accordance with the Lobbying and Disclosure Act of 1995. Currently, AARP Tax-Aide has over 7,000 sites nationwide and over 32,000 volunteers who now serve more than 2 million taxpayers each year.

AARP Tax-Aide in the Community

AARP Tax-Aide services are available from February 1 through April 15 each year at nearly 7,000 sites nationwide. AARP Tax-Aide provides face-to-face counseling at sites across the country located in senior centers, community centers, libraries and other convenient locations.

AARP Tax-Aide offers free electronic filing at more than 5,000 sites nationwide using TaxWise software.

AARP Tax-Aide provides 24-hour year round Internet tax counseling 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 Tax-Aide Volunteers

AARP Tax-Aide assistance is provided by over 32,000 volunteer counselors across the country that are trained, in conjunction with the IRS, to provide assistance in filing basic tax forms. Volunteer’s positions include: (1) counselors who provide one-on-one assistance to middle- and low-income older taxpayers; (2) instructors who train counselors on income tax information and tax return preparation; and (3) coordinators who supervise and direct the AARP Tax-Aide program activities at the local level.

For volunteer information call our toll-free number 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 Tax-Aide please contact your leadership team. Additional frequently asked Questions are included in Appendix L.
Appendix A

Partnership and Communications Specialist (PCS) Job Description

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

Responsibilities of Position: Supported and guided by the State Coordinator (SC) and by the policies and procedures of the Foundation and the Handbook, the Partnerships 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 Tax-Aide Partner Program as it relates to recruitment, program promotion, equipment and/or new sites, as necessary, to ensure that AARP 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 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 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 Tax-Aide Partner Program) at the local level and to design an active and comprehensive publicity plan.

Working Relations: The PCS works closely with the National Partnership and Communications Coordinator and the National Program Consultant 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 Tax-Aide reimburses volunteers for covered program related expenses as set out in the Coordinator's Handbook.

**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) Job Description

Program: The AARP Tax-Aide program provides free tax counseling and preparation to taxpayers with middle and low-income, 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 Handbook, the Communications Coordinator:

- Identifies with the Partnerships 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 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 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 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.

Length 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 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 Tax-Aide reimburses volunteers for covered program related expenses as set out in the Coordinator's Handbook.

**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 state wide 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 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 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 will 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 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 area, and see if you can develop a local partnership.

Remember, a true partnership is where each side benefits. Ways in which AARP 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 Tax-Aide training), and receiving computers or other tangible resources. Contact the AARP Tax-Aide national office for information and assistance.

National Society of Collegiate Scholars [www.nscs.org]

National Society of Collegiate Scholars (NSCS) is made up of honor students who are interested in performing community service. They have chapters throughout the United States.

1. AARP Tax-Aide told college chapters:
   - Students can participate in the regular AARP Tax-Aide tax preparation classes or self-study. In either case, to counsel, they must pass the test.
   - The chapter could open a site on their campus, but should keep it open for non-students in the community.
   - The chapter should seriously consider doing a community service project and visit a senior citizen home nearby and prepare taxes.

2. The site will be an AARP Tax-Aide site and students will be considered an AARP Tax-Aide volunteer for reimbursement purposes if they work the required number of hours. Two locations for background information include the University of Alabama, Tuscaloosa and Lehigh University, PA.

3. National Society of Collegiate Scholars, as part of this partnership, is offering to use their connections at college campuses to assist in locating free rooms for training purposes (likely with computers) for all of our volunteers in that area, if convenient and needed.
Future Business of America (FBLA) www.fbla-pbl.org

This year we are trying to work with this group of business students in the same manner as NSCS. Future Business Leaders of America is a nonprofit education association with a quarter million students preparing for careers in business and business-related fields. We are looking to recruit students from high school and college as part of this partnership.

If you would like to open a tax site at a college please go to the college directly. You may wish to start with the business/accounting section, or the student activity section. If you have problems, please call the National Office

Veterans Administration Hospitals Association (VAHA)

This is the fifth year of our partnership. AARP Tax-Aide and Veterans Administration Hospitals Association targeted stats where there is mutual interest.

1. AARP Tax-Aide’s role
   a. **Train volunteers** - AARP Tax-Aide will provide between 3-5 days of training and test/certify volunteers. This training is designed by AARP Tax-Aide in cooperation with the Internal Revenue Service and delivered by AARP Tax-Aide usually in December or January
   b. **Coordinate sites** - Collect necessary paperwork; supervise the site as we provide an experienced AARP volunteer to train VAHA volunteers and quality review.
   c. **Promotion and Recruitment** - Provide promotional and recruitment items. Speak at the volunteer meetings encouraging participation.

2. VAHA role:
   a. **Recruitment** - VAHA will try to recruit new tax counselors from their volunteer base for the VA site. AARP Tax-Aide will provide recruitment language through brochures and/or a speaker for that endeavor. They may allow an AARP Tax-Aide person to speak to their group.
   b. **Site** - VAHA will provide space at their location for tax preparation. The space should be big enough to allow tax counselors privacy as they provide tax counseling. This space (can be a section of a larger room) should be dedicated for tax counseling on the hours and days determined by the location. It should be accessible for people in wheelchairs or with other disabilities.
   c. **Computers** - The VAHA will likely provide computer use during tax counseling time.
   d. **Promotion** - The VAHA will help promote the AARP Tax-Aide program to its community including patients, employees, and other interested parties. The VA will use AARP Tax-Aide’s tagline, “serving low- and middle-income taxpayers with special attention to those 60 and older,” and that it “is administered through the AARP Foundation in cooperation with the IRS.” AARP Tax-Aide will assist by providing other needed language for promotion if needed.
Veterans of Foreign Wars (VFW) www.vfw.org

This completes our second year of this partnership. AARP Tax-Aide and VFW targeted certain geographic areas to open new sites. If you would like to open a tax site at a VFW Post, please go to the Post directly.

1. AARP Tax-Aide’s role:
   a. Train volunteers - AARP Tax-Aide will provide between 3-5 days of training and test/certify volunteers. This training is designed by AARP Tax-Aide in cooperation with the Internal Revenue Service and delivered by AARP Tax-Aide usually in December or January.
   b. Coordinate sites - Collect necessary paperwork; supervise the site as we provide an experienced AARP volunteer to train VFW volunteers and quality reviewed tax returns prepared.
   c. Promotion and Recruitment - Provide promotional and recruitment items. Speak at the volunteer meetings encouraging participation.

2. VFW role:
   a. Recruitment - VFW may recruit new tax counselors from their volunteer base for the VFW site. AARP Tax-Aide will provide recruitment language through brochures and/or a speaker for that endeavor. VFW may allow an AARP Tax-Aide person to speak to their group.
   b. Site - VFW will provide space at their Post for tax preparation. The space should be big enough to allow tax counselors privacy as they provide tax counseling. This space (can be a section of a larger room) should be dedicated for tax counseling on the hours and days determined by the location. It should be accessible for people in wheelchairs or with other disabilities.
   c. Computers - The VFW will provide computer use during tax counseling time.
   d. Promotion - The VFW will help promote the AARP Tax-Aide program to its community. The VFW will use AARP Tax-Aide’s tagline, “serving low- and middle- income taxpayers with special attention to those 60 and older,” and that “AARP Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS”. AARP Tax-Aide will assist by providing other needed language for promotion if needed.

Goodwill Industries www.goodwill.org

Note: There are other similar social service providers in your community where this model would work. Try going to a United Way, Boys and Girls Club, etc. for the same kind of partnership.

This is the second year of the partnership with Goodwill Industries. AARP Tax-Aide’s program was described in their newsletter and a process was created to connect interested Goodwill Industries sites with AARP Tax-Aide volunteers. If you would like to open a tax site at a Goodwill facility, please go directly to Goodwill.
How Goodwill Industries can be involved with AARP Tax-Aide

1. Provide enough volunteers from staff and/or others to become a Goodwill/AARP Tax-Aide Site.
2. Staff/and or others can volunteer to do free tax preparation at an existing AARP Tax-Aide site.
3. If the Goodwill Industries has available computers, allow AARP Tax-Aide to use their facility to become an AARP Tax-Aide site.
4. Advertise the nearest AARP Tax-Aide at a Goodwill facility.

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 Tax-Aide needs to gain counselors and equipment. AARP Tax-Aide is not just to be a support partner who does training or provides resources.

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

If after the various meetings it is to the benefit of AARP to participate in the coalition ensure that if counselors are going to represent AARP Tax-Aide they 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 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 Tax-Aide and that effort can be done but not reimbursed by AARP Tax-Aide.

1. Advantages of Participating in the Coalition
   a. Access to a new pool of volunteers, site leadership, and computer facilities.
   b. AARP Tax-Aide may serve a more diverse group of taxpayers.
   c. AARP 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 Tax-Aide will need to handle?
   a. Additional effort by AARP Tax Aide Instructors.
   b. Mentoring and quality review by existing AARP Tax-Aide Counselors
   c. Commitment of time to engage in coalition meetings by SC, PCS, and/or DC.
Grisoft

Grisoft is the developer of the AVG Anti-Virus software product line. Licenses of AVG Anti-Virus were donated in 2001 to the AARP Tax-Aide program for over 32,000 volunteers. The partnership between AARP Tax-Aide and Grisoft continues as new licenses are added and existing licenses are upgraded to the newest releases of AVG Anti-Virus. As a provider of anti-virus protection for the AARP Tax-Aide program, Grisoft strongly supports the program and acknowledges the good work being done by the many volunteers who provide free tax support to individuals around the country. Find out more about Grisoft and AVG Anti-Virus by visiting them on the Web at www.grisoft.com.
Appendix D

Sample Solicitation Letter

Date

Name
Title
XYZ Corporation
123 East River Road
City, State, Zip Code

Dear Ms. Name;

Thank you for taking the time to speak with me about the AARP Tax-Aide program’s efforts in the greater City area. As we discussed, AARP Tax-Aide is a free, nationwide tax counseling service offered to taxpayers with low- and middle-income, with special attention to those age 60 and older. AARP Tax-Aide volunteers are trained in cooperation with the Internal Revenue Service to help taxpayers file their federal, state, and local tax returns. AARP Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

Each tax season, AARP Tax-Aide volunteers set up temporary sites in convenient locations, such as the specific site Senior Center and in public libraries, banks, and shopping centers. AARP Tax-Aide volunteers will also travel to special sites such as nursing homes and make personal visits, when possible, to those unable to leave their homes.

Your help in securing laptop computers for our AARP Tax-Aide sites is invaluable. Given the temporary working conditions, a laptop will allow AARP Tax-Aide volunteers to provide electronic filing, the fastest growing method of filing tax returns. Our volunteers will benefit from the ability to easily travel with their equipment from one site to another during the tax season.

<Briefly specify the details of your proposal here.>

Thank you for enabling us to continue our AARP Tax-Aide mission during the upcoming tax season.

Sincerely,

Name
Partnership and Communications Specialist
AARP Tax-Aide
Appendix E

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 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 Tax-Aide program is invaluable. Given the temporary working conditions, portable laptops will allow AARP Tax-Aide volunteers to provide electronic filing more readily. Counselors now can easily travel with their equipment from one site to another during the tax season.

I have enclosed a copy of the news release we plan to publish. On behalf of the AARP 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 Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

Sincerely,

Name  
Partnership and Communications Specialist  
AARP Tax-Aide
Appendix F

Partnership Press Release

FOR IMMEDIATE RELEASE

DATE

CONTACT: Martin Long
PHONE NUMBER(S):

AARP TAX-AIDE PARTNERS WITH YYY IN CLEVELAND

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

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

Last year over 32,000 AARP Tax-Aide volunteers helped over 2 million people file their federal, state and local tax returns. The program is offered at over 7,000 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 Tax-Aide volunteers to provide free electronic filing (e-filing), the fastest growing method to file tax returns. AARP 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 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 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 Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

The AARP Foundation is an affiliated, 501 (c) (3) nonpartisan charitable organization, established in 1961. It administers publicly and privately funded programs, such as AARP Tax-Aide and the AARP Senior Community Service Employment Program. The Foundation also carries out the Washington, D.C.-based advocacy programs funded through Legal Counsel for the Elderly, Inc. These programs also receive support from AARP.

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 assistance and preparation is provided for low- and middle-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.

####

Partnership and Communications Guide 62
Appendix G

Sample Proposal

Proposal for Partnership: This is a one page proposal for a partnership that can be adapted to your needs.

1. **History** - AARP Tax-Aide began in 1968 when Ira Funston, retired attorney for the U.S. Department of Labor, was leading discussion groups for retired people. He learned that they knew little about preparing taxes. Mr. Funston, a member of AARP, enlisted three colleagues and began volunteering to provide tax-counseling assistance.

2. **Currently** - This year, AARP Tax-Aide begins its 39th year. This year alone, over 32,000 volunteers helped more than 2 million taxpayers at over 7,000 sites across the country. As a 501(c)(3), organization, AARP Tax-Aide is part of the AARP Foundation. The program is a PROGRAM OF THE AARP Foundation, offered in conjunction with the IRS. Our mission is to serve low- and middle-income taxpayers with special attention to those 60 and older.

3. **AARP Tax-Aide’s role:**
   a. **Train volunteers** - AARP Tax-Aide will provide approximately 4-5 days of training and test/certify volunteers. This can be done in a classroom situation or be combined with self-study.
   b. **Coordinate sites** - Collect necessary paperwork; supervise the site as we provide an experienced AARP volunteer to train a (name of company) employee to be a site coordinator.
   c. **Promotion and Recruitment** - Provide promotional and recruitment items.
   d. **Promote Partnership** - AARP Tax-Aide will thank (the company) for its service by trying to advertise it in its AARP Tax-Aide publication, which is distributed to its (your state) volunteers.

4. **(Company’s) role:**
   a. **Recruitment** - (Company) will recruit from their employee or membership base for the (Company) site(s) and/or other established AARP Tax-Aide sites. AARP Tax-Aide will provide recruitment language for that endeavor.
   b. **Site** - (Company) will provide space at their location for tax preparation. The space should be big enough to allow tax counselors privacy as they provide tax assistance and preparation. This space should be dedicated for tax assistance and preparation on the hours and days determined by the location.
   c. **Computers** - If available, (company) will provide computer use during tax counseling time.
   d. **Promotion** - (company) will help promote the AARP Tax-Aide program to its employees, in addition using AARP Tax-Aide’s tagline, “serving low- and middle-income taxpayers with special attention to those 60 and older,” and also AARP Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS. AARP Tax-Aide will assist by providing other needed language.
Appendix H

Sample Press Releases

Volunteer Recruitment Press Release

FOR IMMEDIATE RELEASE

DATE

CONTACT:

NAME AND NUMBER

AARP TAX-AIDE PROVIDES FREE TAX TRAINING AND VOLUNTEER OPPORTUNITIES

(CITY/TOWN, STATE)--AARP Tax-Aide, the nation’s largest, free, volunteer-run tax assistance and preparation service is looking for volunteers for either tax counseling and/or leadership positions. Each year from February 1 through April 15, AARP Tax-Aide volunteers prepare federal, state and local tax returns for low- and middle-income taxpayers, with special attention to those age 60 and older. Volunteers are especially needed to assist with electronic filing of tax returns. Volunteers of all ages and backgrounds are welcome. You don’t need to be an AARP member or be a retiree to volunteer (or to receive assistance from AARP Tax-Aide volunteers).

“The AARP Tax-Aide program is a wonderful resource for the American taxpayer,” said (name and title of volunteer spokesperson). “AARP Tax-Aide volunteers get a great deal of satisfaction from helping people deal with the challenges of preparing their tax forms. If you want to help yourself and others with their tax returns, this is the program for you. As always, we need individuals who have good computer skills to assist with electronic filing.”

Last year, over 32,000 AARP Tax-Aide volunteers helped over 2 million people file their personal income tax forms. The program is offered at over 7,000 sites around the country including senior centers, libraries and other convenient locations.

AARP Tax-Aide tax counselor volunteers receive comprehensive training in cooperation with the Internal Revenue Service. 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. Volunteers are reimbursed on a limited basis for qualified program-related expenses. For more information about becoming a local AARP Tax-Aide volunteer, call toll-free 1-888-OURAARP (1-888-687-2277) or visit our web site at www.aarp.org/taxaide.

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

The AARP Foundation is an affiliated, 501 (c) (3) nonpartisan charitable organization, established in 1961. It administers publicly and privately funded programs, such as AARP Tax-Aide and the AARP Senior Community...
Service Employment Program. The Foundation also carries out the Washington, D.C.-based advocacy programs funded through Legal Counsel for the Elderly, Inc. These programs also receive support from AARP.

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 assistance and preparation is provided for low- and middle-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.

####
Volunteer Recruitment

FOR IMMEDIATE RELEASE

(Date)

Contact: (Name and number)

AARP TAX-AIDESEEKS VOLUNTEERS FOR 2007

City, State—This year, AARP 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 Tax-Aide volunteers helped more than (insert data) taxpayers at over (insert data) sites across the state.

“AARP 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 Tax-Aide team, contact (name of contact volunteer, address, telephone number) or call our toll-free number, 1-888-OUR-AARP (1-888-687-2277) or visit our web site at www.aarp.org/taxaide.

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

The AARP Foundation is an affiliated, 501 (c) (3) nonpartisan charitable organization, established in 1961. It administers publicly and privately funded programs, such as AARP Tax-Aide and the AARP Senior Community Service Employment Program. The Foundation also carries out the Washington, D.C.-based advocacy programs funded through Legal Counsel for the Elderly, Inc. These programs also receive support from AARP.

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 assistance and preparation is provided for low- and middle-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 IMMEDIATE RELEASE

Contact:
(Date)

(Name and number)

AARP TAX-AIDE PROVIDES FREE TAX ASSISTANCE AND PREPARATION

(City/Town, State)—Free tax assistance and preparation for taxpayers with low- and middle-income, with special attention to those age 60 and older, is available from AARP 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 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 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 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 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 Tax-Aide site near you.

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

The AARP Foundation is an affiliated, 501 (c) (3) nonpartisan charitable organization. The AARP Foundation administers publicly and privately funded programs, such as AARP Tax-Aide and the AARP Senior Community Service Employment Program. The Foundation also carries out national litigation through AARP Foundation Litigation. These programs also receive support from AARP.

####
FOR IMMEDIATE RELEASE

AARP TAX-AIDE E-FILES RECORD NUMBERS OF TAX RETURNS

(City, State)-This year, AARP Tax-Aide, the nation’s largest free volunteer-run tax assistance and preparation service surpassed last years e-filing records by 21 percent. Nationwide, the number of e-filing sites increased from 4,600 in 2005 to 5,000 in 2006. In (insert state) alone, we e-filed (insert data) at nearly (insert data) sites.

“E-filing is more efficient for the taxpayer; refunds are returned that much sooner. In (insert state), we offer this service at over (insert data) of our sites- hopefully we’ll be able to offer it at most of our sites soon,” said long time tax counselor (insert name) from (city, state).

Volunteers of all ages and backgrounds are welcome; you do not need to be an AARP member or a retiree to become involved. For more information on how you can join the AARP Tax-Aide team, contact (name of contact volunteer, address, telephone number) or call our toll-free number, 1-888-OUR-AARP (1-888-687-2277) or visit our web site at www.aarp.org/taxaide.

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

The AARP Foundation is an affiliated, 501 (c) (3) nonpartisan charitable organization, established in 1961. It administers publicly and privately funded programs, such as AARP Tax-Aide and the AARP Senior Community Service Employment Program. The Foundation also carries out the Washington, D.C.-based advocacy programs funded through Legal Counsel for the Elderly, Inc. These programs also receive support from AARP.

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 assistance and preparation is provided for low- and middle-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 TAX-AIDE SEEKS DONATED COMPUTERS FOR FREE E-FILING SERVICE

(City/Town, State)--AARP Tax-Aide, the nation’s largest, free, volunteer-run tax assistance and preparation service for low-and middle-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 the 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, AARP Tax-Aide offered e-filing at approximately 5,000 of its approximately 7,000 sites around the country using donated computers and printers.

Al Spencer, former Chair of the AARP 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 Tax-Aide program for the upcoming tax season (February 1-April 15, 2007), call (local contact). Donations are tax deductible under applicable law.

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

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

The AARP Foundation is an affiliated, 501 (c) (3) nonpartisan charitable organization, established in 1961. It administers publicly and privately funded programs, such as AARP Tax-Aide and the AARP Senior Community Service Employment Program. The Foundation also carries out the Washington, D.C.-based advocacy programs funded through Legal Counsel for the Elderly, Inc. These programs also receive support from AARP.

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 assistance and preparation is provided for low- and middle-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.
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 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 Tax-Aide’s has over 32,000 volunteers assisting taxpayers with low- and middle-income, with special attention to those age 60 and older, in filing their federal, state and local tax returns. Last year, AARP Tax-Aide assisted over 2 million taxpayers at over 7,000 sites nationwide. In our state alone, we assisted _____ people during last year’s tax season.

AARP 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 Tax-Aide and its services to your group. Please contact me at (phone number), for more information.

I have enclosed an AARP Tax-Aide Program Description and program and volunteer recruitment brochures for your review. Also enclosed is a list of AARP Tax-Aide sites in your area.

AARP 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.

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

The AARP Foundation is an affiliated, 501 (c) (3) nonpartisan charitable organization, established in 1961. It administers publicly and privately funded programs, such as AARP Tax-Aide and the AARP Senior Community Service Employment Program. These programs also receive support from AARP.

Sincerely,

Your name and volunteer title
AARP Tax-Aide
Appendix I

Sample Radio PSA

General Program Promotion-30 seconds

Need Help With Your Taxes?

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

Electronic Filing-30 seconds

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

Volunteer Recruitment-30 seconds

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

Promoción general del programa - 30 segundos

¿Necesita ayuda con sus impuestos?

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

Tramitación electrónica - 30 segundos

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

Reclutamiento de voluntarios - 30 segundos

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 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 Tax-Aide es un programa de AARP Foundation ofrecido, conjuntamente, con el Servicio de Impuestos Internos (IRS).
Appendix J

Television PSA

*General Program Promotion-30 seconds*

Need Help With Your Taxes?

AARP 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](http://www.aarp.org/taxaide). AARP Tax-Aide…people helping people.

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

*Electronic Filing- 30 seconds*

AARP 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 middle-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](http://www.aarp.org/taxaide) or call toll-free 1-888-AARPNOW (888-227-7669).

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

*Volunteer Recruitment-30 seconds*

Join the AARP Tax-Aide Team

Tax time can be fun time if you’re an AARP 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 Tax-Aide is a program of the AARP Foundation, 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 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.


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

Tramitación electrónica - 30 segundos

El Programa de AARP 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).

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

Reclutamiento de voluntarios - 30 segundos

Únase al equipo del Programa de AARP Tax-Aide.


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

Frequently Asked Questions

Q. What is AARP Tax-Aide?
A. AARP Tax-Aide is the nation’s largest, free, volunteer-run tax assistance and preparation service for taxpayers with low- and middle-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.

On-line counseling is available all year. To ask a tax question online, visit our website at www.aarp.org/taxaide and click on the link under “Tax Counseling.”

Q. How many people are involved in this program?
A. (Your state) has about (your state#) counselors at (your state #) locations. Nationwide, the AARP Tax-Aide volunteer corps is comprised of over 32,000 individuals who serve in a number of volunteer positions.

Q. Is AARP Tax-Aide a new program?
A. AARP 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 million taxpayers last year. Last year, AARP 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 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 many AARP Tax-Aide sites.

Q. What other services do you provide?
A. In addition to completing paper tax returns, we also provide electronic filing (e-filing) free of charge at over 5,000 sites nationwide. For those with web access, we provide 24-hour year round online tax counseling via our web site at www.aarp.org/taxaide. In certain circumstances, provisions can also be made to provide home visits for those who are physically unable to leave their home, whenever possible.

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

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 counseling service work year-round.

Q. Do AARP 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. The IRS has given AARP Tax-Aide a 98% accuracy rate on all returns prepared by our program volunteers.

Q. How are your volunteers certified and trained to avoid errors in returns?
A. Our volunteers are trained under IRS supervision through the IRS. 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 Tax-Aide help?
A. They can call our toll-free number during the tax season 1-888-AARPNOW (1-888-227-7669) or visit our web at www.aarp.org/taxaide to locate a site near them. Taxpayers can also use our year-round online counseling service on our website.

Q. What should taxpayers bring with them when they come for help?
A. They should bring current tax year’s forms and preparation booklet; 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
Q. If someone is interested in becoming an AARP Tax-Aide volunteer, what do they need to do?
A. Volunteering with the AARP Tax-Aide program is easy. They can call toll-free, 1-888-OUR-AARP (1-888-687-2277) 24 hours a day, seven days a week and leave your 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. In addition, they can write to us at AARP Tax-Aide, 601 E Street, N.W., Washington, D.C. 20049.

Q. What kind of experience is needed to become an AARP Tax-Aide volunteer?
A. Our volunteer force includes individuals of all ages, races, ethnic groups, income levels and educational backgrounds. To become an AARP 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 counselor, you will be trained and must pass the IRS certification test.

- If you wish to volunteer for a leadership position, you will 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 leadership positions.

Q. What kinds of volunteer positions are available?
A. AARP Tax-Aide offers a myriad of volunteer positions to match someone’s needs and desires. You could be a Regional Coordinator, State Coordinator, Administrative Specialist, Partnership and Communications Specialist, Technology Specialist, Training Specialist, District Coordinator, Communications Coordinator, Instructor, Local Coordinator, or Counselor, depending on your skills and interests and the needs of the program.

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

Q. How much time is an AARP Tax-Aide volunteer required to spend volunteering during the season, from late January through April 15th season?
A. A volunteer is expected to work at an AARP Tax-Aide site(s) for a minimum of 40 hours during the 10-week tax season.

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

## AARP TAX-AIDE ORDER FORM

<table>
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<tr>
<th>STOCK NUMBER</th>
<th>ORDER QUANT</th>
<th>TITLE/DESCRIPTION</th>
<th>ORDER DATE: ___________________________</th>
<th>NEEDED BY: ___________________________</th>
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<td>Tax-Aide Order Form</td>
<td></td>
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<tr>
<td>B131</td>
<td></td>
<td>Envelope: Fulfillment (cherry)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### ENGLISH PUBLICITY MATERIALS

| 1D15925       |             | Recruitment Poster Kit w/ Response Card |                                          |                                        |
| 1D141        |             | Tax-Aide Recruitment Brochure |                                          |                                        |
| 1D13401      |             | Tax-Aide “People Helping People” |                                          |                                        |
| 1D13927      |             | Publicity Announcement/Ad Slips |                                          |                                        |
| 1D17465      |             | Recruitment Announcement Ad Slips |                                          |                                        |
| 1D12609      |             | Tax-Aide Fact Sheet - Prog. Description |                                          |                                        |
| 1D12545      |             | Tax-Aide Countertop Holder - English |                                          |                                        |
| 1D12546      |             | Tax-Aide Long Banner (33 x 8-1/2) |                                          |                                        |
| 1D17223      |             | Free Tax Help & E-File Square Banner |                                          |                                        |
| C1358        | ___each    | Tall A Friend Wallet Card |                                          |                                        |
| 1D143        |             | Tax-Aide Poster - English |                                          |                                        |
| 1D13302      |             | Site Information Flyer – English |                                          |                                        |
| C1174        |             | Recruitment Video/DVD |                                          |                                        |

### SPANISH PUBLICITY MATERIALS

| 1D17222       |             | Tax-Aide Recruitment Brochure-Spanish |                                          |                                        |
| 1D17179       |             | Tax-Aide People Helping People Bro. |                                          |                                        |
| 1D17224       |             | Free Tax Help Square Banner (22 x 25-1/2) |                                          |                                        |
| C1247        |             | Tax-Aide Countertop Holder - Spanish |                                          |                                        |
| 1D13589      |             | Tax-Aide Poster – Spanish |                                          |                                        |
| 1D13309      |             | Site Information Flyer – Spanish |                                          |                                        |
| 1D17464      |             | Tax Record Envelope – Spanish |                                          |                                        |
| C1194        |             | Recruitment Video/DVD-Spanish |                                          |                                        |

### ADMINISTRATIVE MATERIALS

| 1D1200       |             | Tax-Aide Name Card Insert |                                          |                                        |
| C1055        |             | Plastic Name Card Holder |                                          |                                        |
| E134         |             | Standard Expense Statement |                                          |                                        |
| C1118        |             | Volunteer Blue Ribbon |                                          |                                        |
| B955         |             | AARP Stationery (page 1) |                                          |                                        |
| B971         |             | Envelope: AARP Foundation (#10) |                                          |                                        |
| B1013        |             | Envelope: AARP Foundation (9x12) |                                          |                                        |
| D160         |             | Envelope: #10 Business Reply |                                          |                                        |
| B176         |             | Envelope: #10L Business Reply |                                          |                                        |
| D1826        |             | Counselor Digest |                                          |                                        |
| E134         |             | Tax-Aide Program Award Certificate |                                          |                                        |
| D147         |             | Tax-Aide Personnel Form |                                          |                                        |

### SITE MATERIALS

| 1D12225       |             | Tax Record Envelope |                                          |                                        |
| E124         |             | Site Information Form |                                          |                                        |

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### ADDITIONAL ORDERS:

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