1. THINGS TO KNOW & DO, 2003 - 2004 (PAGE 2)
2. ORIENTATION (PAGE 35)
3. EFFECTIVE LEADERSHIP (PAGE 49)
4. RECRUITMENT (PAGE 54)
5. COMMUNICATION RESPONSIBILITIES (PAGE 60)
6. MANAGEMENT RESPONSIBILITIES (PAGE 65)
7. PLANNING AND CONDUCTING MEETINGS (PAGE 69)
8. AARP IN THE STATES (PAGE 72)
9. APPENDIX (PAGE 74)

District Coordinator Training Guide
Counselor Training Outline
Activities, Personnel, and Expense Reports
AARP & AARP Foundation Directory
# A. PLANNING: 1) IRS Organizational Support

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
</tr>
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<tbody>
<tr>
<td>• In the IRS structure, AARP Tax-Aide coordinates program operations with SPEC (Stakeholder Partnerships, Education and Communication). SPEC is part of the larger Wage and Investment Division within the IRS. National and Local IRS contacts for AARP Tax-Aide generally reside in the Field Operations section of SPEC.</td>
<td>• If you are in one of the former IRS Territories changed to PODs, establish contact with your new Territory Manager.</td>
</tr>
<tr>
<td>• IRS SPEC Field Operations has been restructured and is now comprised of four areas, which is broken into a total of 42 (no longer 48) territories. Six former Territory Offices have been converted to Post of Duty (POD) offices. They are Manchester, Buffalo, Baltimore, Columbia SC, Cleveland and St. Louis. Respectively, they report to the following Territory Offices, Boston, Albany, Washington DC, Charlotte, Columbus and Kansas City. (We have asked and been told that SIDN number do NOT need to be changed to reflect SPEC’s new structure.)</td>
<td>• Notify IRS Territory Managers and Tax Specialists of the dates of AARP Tax-Aide state meetings in order to ensure attendance by appropriate IRS personnel.</td>
</tr>
<tr>
<td>• Your contacts in the IRS are the SPEC Territory Managers. Regional Coordinator contacts are IRS Area Directors. Territory Managers report to Area Directors.</td>
<td>• Assure that IRS is on AARP Tax-Aide state meeting agendas.</td>
</tr>
<tr>
<td>• Other contacts for AARP Tax-Aide will be Tax Specialists. Tax Specialists report to Territory Managers. Tax Specialists are especially critical contacts in states covered by a SPEC POD.</td>
<td>• Determine what services IRS staff has provided to your state program in the past. Have discussions with your Territory Manager to determine what support IRS staff will or will not offer in the future and make necessary arrangements to cover those gaps with volunteers.</td>
</tr>
<tr>
<td>• IRS staff (Territory Managers and/or Tax Specialists) should be available to attend AARP Tax-Aide state planning meetings.</td>
<td>• If any gaps remain; discuss your needs with your AARP Tax-Aide Regional Coordinator and IRS SPEC Territory Manager.</td>
</tr>
<tr>
<td>• If situations occur between AARP Tax-Aide at the state level and the Territory Office that are not able to be resolved, the SC should take those concerns to his or her Regional Coordinator. Regional Coordinators will work with Area Directors and/or the AARP Tax-Aide National Office, as appropriate, to address issues needing clarification or resolution.</td>
<td>• IRS may ask your assistance to cover certain, or even all, VITA operations in your state. You must first contact your RC to discuss the request. There are significant grant issues that must be considered, particularly concerning reimbursement. However, there may be many possibilities for collaboration that will benefit both the IRS and AARP Tax-Aide.</td>
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## A. PLANNING: 2) IRS Material Support

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
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</tr>
</thead>
<tbody>
<tr>
<td>• Members of the National Training Committee assisted in the review of IRS’ Student Guide (Pub 678) prior to its printing.</td>
<td>• Let DCs know that AARP Tax-Aide volunteers reviewed IRS training materials and developed and validated test/retest questions.</td>
</tr>
<tr>
<td>• AARP volunteers were an integral part of the development of the integrated approach to training. This approach incorporates tax law and tax preparation software training. Integrated training will help make training more interesting, reduce fatigue, and increase training retention while still achieving the learning objectives in Publication 678.</td>
<td>• Work with the TRS &amp; ADS to negotiate direct ship procedures with the Territory Manager. Adhere to deadlines for submitting addresses to the Territory Office.</td>
</tr>
<tr>
<td>• AARP Tax-Aide Volunteers also participated in the writing and validation of the test and retest. This year the IRS sent the test or retest and the draft training material to ten external partners including AARP. The test and retest were validated against the training material to ensure the answers were correct, clearly written, and representative of the subject matter.</td>
<td>• IRS Order Form (2333V) for TY2004 will be available in late September. It is revised annually. Be sure to use the revised edition. Forms 2333V should be provided to the territories based on the procedures communicated by the territory.</td>
</tr>
<tr>
<td>• The IRS test and retest will be available on the TaxWise version 19.0 CD-ROM shipped to all EFIN holders in early to mid December 2004.</td>
<td>• If you experience problems with the ordering or shipping of IRS materials, contact your IRS SPEC Territory contact.</td>
</tr>
<tr>
<td>• Publication 4012, Volunteer Resource Guide, was modified to pull all tax law quick reference material together in one section and all TaxWise quick reference material in another section. Pub 4012 also includes interview questions for filing status, exemptions, dependents and Earned Income Credit. These questions and those which appear in Pub 678, are designed to provide volunteers a consistent approach to ensuring correct determinations are made in these critical areas.</td>
<td></td>
</tr>
</tbody>
</table>
and envelopes. Only the course number provided in the material should be used on the evaluation form. Emphasis will be placed in the instructor notes to return the evaluations to the Education and Product Development Office for compiling feedback.

- Advance copies of the training materials will be shipped to Training Specialists in late October. The exact locations will be determined by AARP National office.

- IRS site materials must be ordered through the SPEC Territory using Form 2333V. All IRS training materials orders for AARP Tax-Aide should also be submitted to the IRS through your Territory Manager. Territory Managers will ensure Forms 2333V are distributed to AARP as soon as they are available. Training materials ordered by October should be shipped by Thanksgiving.

- All orders including training and VITA/TCE program materials are available to order throughout the filing year as long as inventory exists.

- Pub 1155 kit contents are:
  - Pub 1155 – Instructor Guide
  - Form 6744, Test
  - For 6745, Retest
  - Pub 4189 Test/Retest Answer Key
  - Evaluation Forms
  - Pub 4012, Volunteer Resource Guide
  - Volunteer Plastic Bag
  - Mailing labels for completed evaluation forms

- Pub 678 kit contents are:
  - Pub 678 – Student Guide
  - Form 6744, Test
  - Evaluation Form
  - Pub 4012, Volunteer Resource Guide
  - Volunteer Bag

- Pub 17 should be ordered along with the training materials. It will ship as soon as it is available.

- PDF files of most training materials will be
A. PLANNING: 3) AARP Tax-Aide Program Planning Processes

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<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
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<tbody>
<tr>
<td>• Specific needs (recruitment, promotion, sponsors, etc.) within the state must be identified before actions can be planned.</td>
<td>• Identify needs within the state and set specific goals to improve and/or increase service (site growth, Quality Review, volunteer growth, site quality, diversity, night/weekend hours, evaluate progress). This is best in writing.</td>
</tr>
<tr>
<td>• Regional Coordinators should establish the context for state goals.</td>
<td>• Provide finalized state goals and action steps to the Regional Coordinator.</td>
</tr>
<tr>
<td>• The State Management Team is a valuable resource, not only for implementation but also for state planning.</td>
<td>• Use the knowledge and consider the advice of your State Management Team as you set goals and determine action plans. Delegate as appropriate to these key volunteers. Your workload will be lighter and your state will benefit from the different ideas and additional effort of a team.</td>
</tr>
<tr>
<td>• Good fiscal sense and responsibility should be wired throughout state goals.</td>
<td>• Challenge/encourage all DCs in your state to 1) open at least one new e-filing site (or convert an existing site to e-filing) and 2) have at least one site in their district offer new night or weekend hours. Encourage site consolidation in populous areas, especially where e-filing is present.</td>
</tr>
<tr>
<td>• Extending hours into the evening and/or weekend is a tactic toward recruiting a new group of volunteers (not yet retired). Additionally, these hours will open the site to a new customer base -- those not yet retired and seniors dependent on those not yet retired for transportation.</td>
<td>• Ask DCs to commit to other specific actions necessary for reaching any and all state goals.</td>
</tr>
<tr>
<td>• The volunteer assessment forms and customer surveys provide important feedback from which to develop future planning.</td>
<td>• Have DCs obtain similar commitments from LCs to specific actions that will achieve state goals.</td>
</tr>
<tr>
<td>• A Volunteer Learning Series (VLS) booklet on Planning and Goal Setting (stock # D16707) is available from AARP Fulfillment. It can be ordered with an AARP fulfillment order form which is available on the Extranet (See Extranet section of the Know and Do for more details on the Extranet.)</td>
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## A. PLANNING: 4) AARP State Planning & State Offices

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<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
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<tr>
<td>• State planning guidelines are usually distributed to State offices in the fall. Planning in the states is about achieving results in AARP’s social impact priorities: Economic Security Health Livable Communities Access to Information</td>
<td>• Contact your AARP State Director or designated Associate State Director (ASD) as soon as possible to discuss your overall AARP Tax-Aide plans and service goals for the coming tax season. Ask/negotiate for their help with components of your plan, as appropriate. Also discuss ways to work together in 2005 to achieve program and service goals for both AARP Tax-Aide and State identified priorities.</td>
</tr>
<tr>
<td>• Through its wide network of community services sites, AARP Tax-Aide is a major means by which AARP addresses the Economic Security strategy of making it easier for consumers to maximize pre-and post retirement income and assets.</td>
<td>• Discuss your state's diversity outreach plans for the 2005 tax season with your AARP ASD to look for ways to work together to achieve maximum results.</td>
</tr>
<tr>
<td>• Increased integration of all community service activities, including community programs, Chapters and NRTA with state activities is a key task to build in the 2005 state plans. This includes efforts to serve more people and increase the diversity of both volunteers and clients served.</td>
<td>• If you haven’t already done so, have your AARP ASD advise you of the state volunteer structure as established by the AARP State office. Continue building relationships with other state level volunteers, especially the Executive Council volunteer for community service and leaders of other programs in your state. Look for ways, as appropriate, to collaborate for the benefit of all involved.</td>
</tr>
<tr>
<td>• State Planning should be a collaborative process between you as the State Coordinator and representative of AARP Tax-Aide in your state, and your designated Associate State Director in the AARP State office. State offices usually submit their state plans to headquarters by late fall.</td>
<td>• Discuss with your State President, State Director, and Executive Council volunteer for community service what AARP Tax-Aide and state office meetings are appropriate and mutually beneficial to attend and participate in for the remainder of 2004 and in 2005.</td>
</tr>
<tr>
<td>• Each state has an Executive Council made up of the State President, State Director and volunteers for Community Service, Advocacy and Communications.</td>
<td>• Continue to orient AARP State President, State Director, Associate State Directors or Executive Council Members for Community Service to AARP Tax-Aide operations and realities in your state. Continue to reinforce that as volunteers in an AARP Foundation federal grant program, AARP Tax-Aide volunteers cannot be solicited as such for advocacy related activities. If you have questions about AARP state issues, contact Tina Purser Langley at the National Office.</td>
</tr>
</tbody>
</table>
## B. TECHNOLOGY: 1) E-Filing: a) TC Position and E-filing Counselors

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
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<tbody>
<tr>
<td>• TCSs should work with the SC to recruit more TCs. TCS should delegate responsibilities to the TCs for implementation of e-filing at the local level.</td>
<td>• Encourage DCs to recruit TCs, with the help and support of the TCS.</td>
</tr>
<tr>
<td>• TCs provide e-filing training, site set-up, hardware expertise and/or ongoing software support (mentoring) within their respective districts.</td>
<td>• Consider having PVC or designee customize the 888-227-7669 number to advertise the need for computer-literate individuals who can serve as TCs, e-filers or online tax counselors.</td>
</tr>
<tr>
<td>• TCs report to District Coordinators, but should have a very strong working relationship with the state-level TCS.</td>
<td>• Recruit and encourage DCs to recruit computer-literate individuals from outside sources such as universities, computer clubs, senior centers that offer computer classes, etc. VolunteerMatch, a free Internet recruitment site, is a source of volunteers especially for those positions where experience with computers is beneficial. Work with PCS and CCs to design recruitment campaigns.</td>
</tr>
<tr>
<td>• The 888-227-7669 voice-mail system can be customized to reflect state specific recruitment needs, such as desire for more TCs.</td>
<td>• Don't assume that a counselor doing paper and pencil returns does not want to e-file. He/she may just not have been asked.</td>
</tr>
<tr>
<td>• More TCs and others are needed to support e-filing effort and expansion.</td>
<td>• Consider computer-savvy college or even high school students as e-filers. They may get community service or even graduation credit for volunteering for AARP Tax-Aide.</td>
</tr>
<tr>
<td>• A district can have more than one TC, if needed. If you have 2 TCs in one district, one can handle technology (hardware expert) and the other can handle software needs (TaxWise expert), or you can have the district split in two and have each TC handle one-half of the district.</td>
<td>• Discuss with TCS the availability of having up to 3 TCs report to the TCS. Incorporate as appropriate and needed to help relieve the TCS of some of the TCS workload by delegating tasks such as inventory, software ordering, etc. to these TCs.</td>
</tr>
<tr>
<td>• TCs should have tax training but it is not required as long as they do not also counsel, especially if the TC is the &quot;hardware expert.&quot;</td>
<td></td>
</tr>
<tr>
<td>• Up to three TCs may report to the TCS for state level duties. Refer to the TCS and TC job descriptions in the Technology Management Guide for more information.</td>
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### B. TECHNOLOGY:  1) E-Filing:  b) Software Acquisition

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<tr>
<th>Things State Coordinators Should Know:</th>
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<tr>
<td>• To facilitate volunteer electronic filing of taxpayer returns, the IRS provides TaxWise software. UTS (Universal Tax Systems), the developer of TaxWise software, contracted with IRS to support the use of its software on computers with Windows 2000 or Windows XP operating systems. If running the software in an operating environment other than Windows 2000 or Windows XP UTS is not required to provide assistance in resolution of software operating issues.</td>
<td>• Emphasize to DCs and the TCS that Tax-Aide needs to use the software (TaxWise) that the IRS provides as cost for any other software cannot be reimbursed.</td>
</tr>
<tr>
<td>• The TCS or his/her designee should work with their local Territory Office to order TaxWise software. SPEC Territory Offices are responsible for placing all software orders for new EFIN or EFIN that had 35 or more accepted e-filed returns last season. Software ordering begins September 2004. Before software can be ordered, the site must be shown in STARS as an e-file site. Software orders will be accepted through the end of January 2005 and are filled on a first come first serve basis. Acknowledgement of software orders will be sent via email to the site contact provided at the time the software is ordered. Software delivery is expected to begin December 10, 2004.</td>
<td>• Assure that someone (ideally the TCS or their designated TC) work with the local Territory office to ensure the software orders are accurate. Instructions for ordering the TaxWise software have been sent to the TCS with a copy to the SC.</td>
</tr>
<tr>
<td>• Orders for software for EFIN that had 1-34 accepted e-filed returns last season must be submitted and approved by AARP State and Regional Coordinators. The order must be submitted for approval with a justification for reordering since the EFIN did not meet the IRS established 35 accepted return minimum. The RC will forward the approved request to AARP national office who will, in turn, forward it to SPEC Atlanta. At that time, the order can be submitted to the Territory Office for actual ordering.</td>
<td>• Submit justification for any software that had 1-34 accepted e-filed returns through your Regional Coordinator for approval.</td>
</tr>
<tr>
<td>• An Electronic Filing Identification Number (EFIN) and site identification numbers (SIDN) will be needed when ordering the tax preparation/transmission software.</td>
<td>• Communicate via the TCS that the IRS or Universal Tax Systems (UTS) will not provide user support for TaxWise software loaded on a computer that is not running Windows 2000 or Windows XP operating systems.</td>
</tr>
<tr>
<td>• The IRS has no plans to update the VITA/TCE image used for 2005 with Microsoft’s XP Service Pack 2. The Service Pack releases a number of changes which are</td>
<td>• In concert with the TCS, eliminate ordering of software by AARP Tax-Aide volunteers that are not transmitting returns.</td>
</tr>
<tr>
<td></td>
<td>• All calls regarding missing orders should be directed to the Territory Office. If you cannot get a satisfactory response from the Territory Office contact your Regional Coordinator who will work with Lorraine Thompson, Senior Analyst in SPEC.</td>
</tr>
<tr>
<td></td>
<td>• See Technology Management Guide for additional details on ordering software.</td>
</tr>
<tr>
<td></td>
<td>• See Training, Support and Other Issues section of this Know and Do for software support guidance.</td>
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</tbody>
</table>
intended to “lock” the image. Based on their current review, these changes would not improve the operation of the VITA/TCE image and since UTS has indicated there should be no problem running their program without Service Pack 2, SPEC has not requested the update.

- TaxWise software is purchased for preparing and transmitting electronic returns. Although there are some instances when a return cannot be electronically filed, this should be rare.

- The volunteer programs using TaxWise software are permitted to perform indirect transmissions of returns only through the Electronic Filing Center (EFC) maintained by UTS. Transmissions can be made via a toll-free number provided by UTS or the Internet. Transmissions should only be made from one machine per EFIN.

- Transmission of returns using any software other than TaxWise, will not be reimbursed.
B. TECHNOLOGY:  1) E-Filing: c) PINs

**Things State Coordinators Should Know:**

- As they have in the past, IRS SPEC Territory Offices will likely continue to hold 8453 forms on behalf of volunteers. However, retention of 8453 forms is no longer a given. Territory Office can require local volunteers to hold the 8453 forms through the required holding period – December 31st. Although most, if not all, Territory Offices are likely to retain the forms for the program at least for this year, volunteers are strongly encouraged to continue evolving to using the Pin program. With the PIN program, no one, neither the volunteers nor the IRS, needs to be burdened with the retention of the 8453 forms.

- There are two PIN programs - the Self-Select PIN Program and the Paid Preparer (Practitioner) PIN Program. Both of these programs were developed by the IRS to reduce the paper work required by e-filing. PIN programs are used instead of using 8453s, and unlike 8453’s, do not require mailing of forms to IRS Processing Centers.

- IRS SPEC issued a policy decision in September 2002 that VITA and TCE volunteers, including AARP Tax-Aide volunteers, are prohibited from participating in the Paid Preparer (Practitioner) PIN Program. This decision was based on the heightened fraud risk, potential liability placed on volunteers and record retention requirement associated with participation in this program.

- The Self-Select PIN Program has been successfully used by AARP Tax-Aide volunteers. E-file administration is significantly reduced as no taxpayer paperwork (1099s, W-2s, 8654's, etc.) is required to be collected by volunteers and submitted to the IRS. Summertime letters from the IRS to volunteers requesting "missing 8453s” are eliminated as well.

**Things State Coordinators Should Do:**

- Communicate that:
  1. Self-Select PIN Program is an approved option to using Form 8453.
  2. If unable to obtain AGI for the Self-Select PIN the Form 8453 must be used.
  3. Paid Preparer PIN program is prohibited for AARP Tax-Aide volunteers by the IRS.

- There can be no negotiation on the requirement for AARP Tax-Aide volunteers that the customers, both if married, must key in their own PINs. The volunteer must actually hand the customer the keyboard.

- What if the taxpayer did not bring in last year's tax return?
  If a free phone is available, the taxpayer may call the IRS toll free number at 1-800-829-1040. If they can provide certain information to the Customer Service Representative (such as their name, SSN, and current address), they may receive the Adjusted Gross Income (AGI) over the phone.
**Things State Coordinators Should Know:**

- AARP National Technology Committee members assisted in the review of Publication 3189, Volunteer e-file Administrator Guide.

- The Technology Management Guide has been revised by the National Technology Committee.

- The Electronic Filing Qualification Workbook has been discontinued as similar type taxpayer problems that can be completed in TaxWise have been incorporated into Pub 678.

- The Technology Management Guide will be sent automatically to all TCSs and TCs who are listed on the National Office volunteer database with these titles. Copies may be ordered for other volunteers who serve as TCs but for whom the database has not yet been updated to reflect the additional title by the TCS sending a list of names and addresses to the National Office at taxaidetech@aarp.org. This document will also be available on the Extranet at www.aarp.org/tavolunteers (this web address is case-sensitive).

- IRS has several e-file publications. Pubs 1345 and 1345A are shipped automatically to EFIN contacts listed on Forms 8633. All publications are available via Form 2333V.
  1) Pub 1345 IRS E-File Handbook
  2) Pub 1345A Filing Season Supplement (with error codes)
  4) Pub 3611 Electronic Payments
  5) Pub 3888 C-VITA
  6) Pub 3922 C-VITA Supplement (Include problems for possible use in training.)

**Things State Coordinators Should Do:**

- Ensure printed materials distribution as needed throughout the state. Materials may be ordered through Fulfillment by mail using the cherry envelope, or by fax at (202) 434-6987. Caution: Order Pub. 3189 from IRS, not AARP Tax-Aide.

- Ask the TCS and TC to take the lead in ordering, or encouraging the ordering of printed e-filing materials.

- Encourage volunteers involved with e-filing to read the revised materials.

- Encourage the use of signs at sites that declare, "AARP Tax-Aide Free E-Filing Site" (stock #D17223).

- Encourage volunteers to update the volunteer database by adding the TC title to any volunteer acting in that capacity regardless of any other position the volunteer holds. (The new database can hold multiple titles per volunteer.)

- Ensure that the TCS is aware that they must order the Technology Management Guide for any volunteer who acts as a TC, but is not listed on the database as such. They will not receive the Technology Packet in the automatic distribution.
B. TECHNOLOGY:  

### Things State Coordinators Should Know:  

1) **E-Filing:**  
e) Local Donations

- The AARP Foundation is a 501(c)(3) organization (chapters and AARP are not). The AARP Foundation’s Federal EIN is 52-0794300.

- AARP Tax-Aide volunteers are not obligated to seek equipment donations; seeking donations is a beneficial, but not a required volunteer activity.

- AARP Tax-Aide volunteers may solicit donations of computers and supplies.

- Monetary donations must not be solicited at sites. As an example, “Tin Cups” requesting “donations” to AARP Tax-Aide are not allowed. If Senior Centers solicit contributions/donations it must not even appear to be linked to the AARP Tax-Aide service.

- Donations cannot be accepted by volunteers, even if not solicited, from customers at sites.

- “Cash” (check payable to AARP Foundation Tax-Aide) can be accepted by volunteers from third parties (non-customers). Checks must go to the National Office for deposit and should be sent to Luisa Chaoui at AARP Tax-Aide, 601 E Street, NW, Washington, DC 20049. The funds are allocated to the recipient state and the SC controls how the funds are spent.

- No business reply envelopes (BREs) for donations will be provided.

- No state bank accounts are allowed. No volunteer is to open bank accounts for AARP Tax-Aide donations.

- Local-level volunteers should not sign any agreements/grants that may obligate the AARP Tax-Aide Program.

- Before signing any one-time donation grant agreements, all volunteers should confer with their Regional Coordinator for clearance.

### Things State Coordinators Should Do:

- Ensure that the donations acceptance form (found in the Coordinator Handbook) is completed for donations and that donors are thanked.

- Ensure that volunteers understand that the services provided are free. Ensure that AARP Tax-Aide volunteers are not accepting donations and that site sponsors are not soliciting donations in any manner that appears to be connected to receiving AARP Tax-Aide service at their facility. Volunteers must always advise customers wishing to make a donation that the services are free.

- Any monetary donations must be directed to the National Office. The donation should be mailed to Luisa Chaoui at the National Office (address to the left) and will be allocated to the recipient state.

- Ensure that the PCS is aware of equipment and supply needs for publicity purposes.

- Establish a system that keeps the SC and RC informed of donations received.

- Clear all grant agreements with Regional Coordinator.
## B. TECHNOLOGY:  1) E-Filing:  f) Computers & Printers

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<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
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<tr>
<td>All IRS computers are provided on a one-</td>
<td>Provide direction to TCS to ensure</td>
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<tr>
<td>season loan basis; printers may be loaned</td>
<td>equipment needs are shared with the</td>
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<td>for longer periods; IRS is legally precluded</td>
<td>territory office for consideration when</td>
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<tr>
<td>from “giving” equipment to AARP Tax-</td>
<td>equipment becomes available.</td>
</tr>
<tr>
<td>Aide at the present time. Beginning with</td>
<td>• Work with TCS to inventory hardware,</td>
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<tr>
<td>filing season 2005, AARP Tax-Aide</td>
<td>including where it came from (AARP</td>
</tr>
<tr>
<td>determines where IRS equipment is loaned</td>
<td>Tax-Aide National Office, Territory</td>
</tr>
<tr>
<td>without any requirement for local IRS</td>
<td>Manager, AARP, local donations, etc.)</td>
</tr>
<tr>
<td>approval.</td>
<td>and whether it is a donation or loan.</td>
</tr>
<tr>
<td>IRS requires that loaned equipment is</td>
<td>• Strategically allocate laptops and</td>
</tr>
<tr>
<td>acknowledged on the Property Loan</td>
<td>printers for maximum productivity.</td>
</tr>
<tr>
<td>Agreement. Equipment will be received</td>
<td>Our manuals demonstrate ways to</td>
</tr>
<tr>
<td>with the loan and the responsible individual should acknowledge receipt of the</td>
<td>effectively use one printer to serve</td>
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<tr>
<td>equipment.</td>
<td>four or more computers.</td>
</tr>
<tr>
<td>100% HP compatible printers is the stated</td>
<td>• Encourage use of roving laptops in</td>
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<tr>
<td>standard for TaxWise software. In practice,</td>
<td>order to start new e-file sites or</td>
</tr>
<tr>
<td>we have found that most ink jet and laser</td>
<td>service remote areas.</td>
</tr>
<tr>
<td>printers work with the software.</td>
<td>• Data must be deleted at the end of</td>
</tr>
<tr>
<td>A state inventory of all hardware donated</td>
<td>the filing season from all computers,</td>
</tr>
<tr>
<td>to AARP Tax-Aide and loaned to the program by the IRS must be maintained by TCS</td>
<td>personal or loaned. For IRS loaned</td>
</tr>
<tr>
<td>at all times. An updated copy of the inventory should be sent to the National Office at</td>
<td>computers, use the wipe disk program</td>
</tr>
<tr>
<td>the end of each tax preparation season. The SC needs to have a copy as a backup. The</td>
<td>loaded on the IRS loaned computers.</td>
</tr>
<tr>
<td>procedures for hardware inventory are outlined in the Technology Management</td>
<td>Property certification/data deletion documents must</td>
</tr>
<tr>
<td>Guide.</td>
<td>be provided to the local SPEC Territory Office by May 31 on all printers loaned</td>
</tr>
<tr>
<td>The IRS has developed procedures for</td>
<td>by the IRS. For non-IRS equipment, use</td>
</tr>
<tr>
<td>return of IRS loaned equipment. A yellow two sided laminated document was created</td>
<td>TPClear, or this year’s iteration.</td>
</tr>
<tr>
<td>for this purpose (Publication 4390, VITA/TCE Computer Loan Program). The Depot is placing one in each computer bag.</td>
<td>• See Technology Management Guide and</td>
</tr>
<tr>
<td>The IRS has no plans to update the</td>
<td>IRS Pub 3189 for additional details on IRS</td>
</tr>
<tr>
<td>VITA/TCE image used for 2005 with</td>
<td>equipment.</td>
</tr>
<tr>
<td>Microsoft’s XP Service Pack 2. The</td>
<td></td>
</tr>
<tr>
<td>Service Pack releases a number of changes</td>
<td></td>
</tr>
<tr>
<td>which are intended to “lock” the image.</td>
<td></td>
</tr>
<tr>
<td>Based on their current review, these changes would not improve the operation of the VITA/TCE image and since UTS has</td>
<td></td>
</tr>
</tbody>
</table>
indicated there should be no problem running their program without Service Pack 2, SPEC has not requested the update.

B. TECHNOLOGY:  

1) E-Filing:  

g) Margaret Drescher Award for E-Filing

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
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</thead>
<tbody>
<tr>
<td>Margaret Drescher of Medford, OR, was the first National Technology Committee Chair, inspiring others with her enthusiasm and positive attitude to accept the challenge of transitioning to electronic filing.</td>
<td>Based on the guidelines for the Margaret Drescher Award for E-Filing, State Coordinators should request award certificates and the appropriate color &quot;stickers&quot; from their Volunteer Technician (Diamond or Luis) at the AARP Tax-Aide National Office.</td>
</tr>
<tr>
<td>A Margaret Drescher Award for E-Filing has been established to recognize sites that excel in e-filing service.</td>
<td>State Coordinators should present awards to the DCs at their Fall Meetings for them to give to the appropriate volunteers to display at their sites.</td>
</tr>
<tr>
<td>A site must have a minimum of 50 accepted federal e-file returns and meet one of the percent levels below, in order to be eligible to receive award certificates.</td>
<td></td>
</tr>
<tr>
<td>Certificates have space on them for 5 &quot;stickers&quot; that will have yearly dates on them.</td>
<td></td>
</tr>
<tr>
<td>The &quot;stickers&quot; will be different colors determined by percentage of federal returns e-filed.</td>
<td></td>
</tr>
<tr>
<td>• 40% e-filed = bronze</td>
<td></td>
</tr>
<tr>
<td>• 60% e-filed = silver</td>
<td></td>
</tr>
<tr>
<td>• 80% e-filed = gold</td>
<td></td>
</tr>
<tr>
<td>Award is given to sites, not individuals, thus requiring a team effort.</td>
<td></td>
</tr>
<tr>
<td>The number of accepted returns is determined from IRS statistics related to EFINs.</td>
<td></td>
</tr>
<tr>
<td>The total number of federal returns is determined from the AARP Tax-Aide activity reports.</td>
<td></td>
</tr>
<tr>
<td>Certificates are available for ordering in time for the 2004 Fall Meetings, and will be awarded based on last season's stats.</td>
<td></td>
</tr>
</tbody>
</table>
### Things State Coordinators Should Know:

- Enhanced IRS materials (Pubs 4012, 3189 and 678) are available for training and as a resource for e-filing volunteers. Additionally, AARP Tax-Aide produces the Technology Management Guide.

- The national office is currently hiring a new position, Program Technology Manager, to augment e-filing support for volunteers.

- E-filing volunteer calls to UTS for support of the TaxWise software should be directed to the regular **800-411-6391** number Customer Support Hotline. A special 800 number technical assistance support line is available to TCSs only and requires a valid password. Access to this line by anyone other than the TCS is strictly prohibited. **No one other than the IRS Point of Contact may contact specific employees of UTS directly.**

- Questions and problems can also be submitted to the National Technology Committee for assistance especially if the 800 number for UTS has not proven successful. The Tech committee and new Technology Manager can access UTS for information or intervention as necessary.

- "Super Sites" (large, multiple-day sites with multiple computers), help to consolidate training, equipment, and support resources.

- Appropriate steps to secure computers with taxpayer data must be taken at all times. After the season, taxpayer data and the TaxWise program must be deleted from the computer. During the season, TaxWise must be password-protected. A common term such as "AARP TCE" that is easy to remember and that is shared at the site is acceptable if the computer is reasonably secured between site operating hours. If the computer is used by non-volunteers, a more unique password is needed.

- State Coordinators may encourage, but are not required, to retain taxpayer data from one tax

### Things State Coordinators Should Do:

- See E-filing Printed Materials section of the Know and Do for more details on the IRS and AARP e-filing publications.

- E-mail taxaidechte@aarp.org (a new e-mail address) to pose questions and get assistance from the National AARP Tax-Aide Technology Committee.

- Help ensure that only the TCS uses the special 800 technical assistance support line. Encourage other e-filing volunteers to reference available printed materials, contact their TCs (or TCS) or use the regular UTS 800-411-6391, as most appropriate, if they are having problems with the software.

- Remind volunteer that no one other than the IRS point of contact may contact specific employees of UTS directly. The Contractor is responsible for delivering services to the IRS as outlined in the requirements of the contract. In addition, services requested in addition to the contractual agreement could result in a cost to IRS and result in an unauthorized procurement. Utilize the procedures above.

- Encourage TCS, TCs and DCs to review and consolidate inefficient or nearby e-filing sites into "Super Sites."

- Work with TCs through the TCS to ensure that taxpayer data is password protected and that taxpayer data is deleted at the end of the season. It is highly recommended to copy taxpayer data to a disk and delete it off computers throughout the season (once the returns are accepted by the IRS). This minimizes the number of taxpayers exposed to potential identity theft if computers are stolen. **Contact your Regional Coordinator immediately if ANY computer housing taxpayer data is stolen.**

- Between Oct. 1 and Feb. 1, in conjunction with the TCS, designate the individual
season and distribute the data at the beginning of the next season.

- For states retaining tax return data, one person in each state will collect and store return data in locked media storage boxes.
- Authorization forms are required for data retention.
- Data must be deleted from all computers after the filing season.
- The individual responsible for data retention for the upcoming tax season.
- Designate where the authorization forms will be held during the tax season.
- Ensure that the taxpayer data and the accompanying authorization forms are disposed of by May 31 of the tax season of the following year (e.g., retained data from tax year 2004 is used for the 2005 tax season and disposed of by May 31, 2005).
- Convey the preceding information to District, Local Coordinators, and Technology Coordinators.

B. TECHNOLOGY:

2) Online Tax Counseling

**Things State Coordinators Should Know:**

- Online counseling is a year-round service and is a growing part of the program. 12,145 tax questions were answered between October 2003 and May 2004. Customers access the service via AARP Tax-Aide’s web page at www.aarp.org/taxaide. Questions are posted, answers are quality reviewed and e-mailed back to customer.

- *Counselors who have passed all three sections of the IRS test are eligible to counsel online.* Certified Instructors are eligible to quality review.

- Online counselors will be reminded not to answer questions beyond their training. Volunteers are not to deal with topics with which they have no current professional experience, or on which they have not received IRS or AARP Tax-Aide training.

- Candidates who want to be considered for online counseling (counselors or quality reviewers) should logon to the AARP Tax-Aide extranet site at www.aarp.org/tavolunteers for a link to the form for online counseling registration.

- Once a prospective online counselor has filled out the registration form on the Extranet, the National Office will contact the state's SC for verification that the candidate has taken and

**Things State Coordinators Should Do:**

- Promote the service to the public, and encourage volunteers to become online tax counselors and quality reviewers.

- SC should determine who in their state (TRS, ADS, or themselves) will be responsible for verifying prospective and returning online counselors and quality reviewers.

- Notify TRS or ADS (SC designee) of their responsibility in verifying online tax counselors. Annual registration process will be started by the National Office the first of February, after most annual testing has occurred, and will be coordinated with the SC with copies to the RC.

- SC should forward to the appropriate designee (TRS or ADS), the lists of prospective and returning online counselors and reviewers received from National Office needing confirmation that they have passed all three parts of the annual IRS certification test.
passed all three sections of the current year IRS test. SCs should forward to the appropriate designee in their state (ADS or TRS) for verification.

- All returning online counselors and quality reviewers will need to pass the test each year, and also receive verification by the TRS or ADS (as the SC designates) to continue in the online counseling system.

- SCs should expect an initial list of all prospective and returning online counselors and quality reviewers by February 1 for verification. Verification of the prospective and returning online counselors and reviewers should be sent to David Alexander at the National Office (taxaidetech@aarp.org) by February 20, to avoid being deleted from the system.

- Additional prospects who sign-up after the February 1 date will be forwarded to the SC as received and verification will be expected within a reasonable time frame (2-3 days).

- There is no reimbursement for telephone bill or ISP service expenses incurred while serving as an Online Tax Counselor or Quality Reviewer.

- Online counseling may be done exclusively or in addition to walk-in site service.

- Counselors (including exclusively online counselors) must volunteer 40 hours during the 10-week season in order to qualify for reimbursement. The reimbursement for online counseling is NOT in addition to reimbursement received for volunteering at an in-person site.
### B. TECHNOLOGY: 3) Extranet

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Extranet provides Management Guides, forms and other support documents to AARP Tax-Aide volunteers with access to the Internet. The address is: <a href="http://www.aarp.org/tavolunteers">www.aarp.org/tavolunteers</a> (this web address is case sensitive).</td>
<td>• Promote the availability of this resource to AARP Tax-Aide volunteers. <a href="http://www.aarp.org/tavolunteers">www.aarp.org/tavolunteers</a></td>
</tr>
<tr>
<td>• The service potential is limitless, including downloadable software, printed documents and forms, and application processes. New features will continue to be added.</td>
<td>• Give ideas for new/wished uses and applications to Regional Coordinators.</td>
</tr>
<tr>
<td>• Currently available on the Extranet are several of the program's Management Guides, the Personnel Form, the Site Form, an expense reimbursement form, and several e-file resources for downloading. The Coordinator Handbook, the IRS Property Loan Agreement Form, PVC/888 number instructions, and the other management guides will be added in the coming months.</td>
<td></td>
</tr>
</tbody>
</table>
### Things State Coordinators Should Know:

- **AARP The Magazine’s Perspectives** messages are decided by AARP’s field communications staff. National stories and promotions are generated by the AARP Tax-Aide National Office and submitted periodically.

- **AARP The Magazine** has an inkjet message. An inkjet message is very brief and can be used for recruitment or program promotion. *AARP The Magazine* will run a default inkjet message (a default is used when no other community service program and/or AARP state office submits a message) for recruitment in the Sept./Oct. issue and will likely run one in Nov./Dec. A program promotion inkjet will likely run in the Jan./Feb. issue. You can submit your own personalized message through the AARP state communication staff to replace the generic default. This will ensure that state office does not approve another message and bump the default national AARP Tax-Aide recruitment message.

- The **Bulletin** is expected to run a recruitment message in the November issue.

- **Connections** (AARP publication for volunteer leaders) will run a recruitment piece in the national edition of the September issue and likely one in October. The AARP Tax-Aide national office will try to run a promotion article late 2004/early 2005.

- Tina Purser Langley is available to handle national AARP Tax-Aide publicity questions. She can be reached at 1-800-424-2277 x2043 or tplangley@aarp.org.

### Things State Coordinators Should Do:

- Emphasize the need throughout the state for communication about AARP Tax-Aide’s recruitment and publicity priorities.

- Ensure that the PCS knows deadlines for AARP publication *Connections* and submits requests for state version.

- Emphasize that *AARP The Magazine* has a local inkjet message that can be used for recruitment and promotion. This 100-word message, which can be localized (for specific categories of volunteers or for certain zip code designations), must go through the AARP state communication staff and be approved by the State Director.

- Ensure that 888 AARPNOW (888-227-7669) voicemail box messages and web/paper referrals generated by this publicity are followed-up. National efforts for recruitment begin in August and go throughout the fall, it is important to have someone check the voicemail box at all times.

- Tell DCs to be flexible in receiving late recruits, even those received during the season. They may be able to use them as "greeters" at the site if they missed tax training. Some late recruits are allowed to prepare taxes for clients even if they miss training by self-studying and working closely with a seasoned counselor once they pass the test and are certified.

- Send copies of letters of tax customer’s expression of appreciation to the AARP Tax-Aide National Office (attn: Tina Purser Langley).
### C. VOLUNTEER SUPPORT: 1) Recruitment: b) PVC Position

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know</th>
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<tbody>
<tr>
<td>• PVC = Prospective Volunteer Coordinator; AARP membership is not required for this position.</td>
<td>• Train and supervise PVCs or designee to carry out intake and tracking responsibilities of the 888 number (1-888-227-7669). Instructions will be available on the Extranet soon.</td>
</tr>
<tr>
<td>• Establishing a new PVC position is optional but highly recommended; functions are required (if done by another existing position, keep that existing title).</td>
<td>• Personalize outgoing 888# voicemail box messages, tailoring them to local needs. Specify e-file recruitment needs.</td>
</tr>
<tr>
<td>• The functions are year round and a good opportunity for homebound volunteers.</td>
<td>• Have PVCs order PCOS brochure (stock #D16708) in quantity from their respective Volunteer Technician at the National Office.</td>
</tr>
<tr>
<td>• PVC or designee is the intended distribution point for Prospective Counselor Orientation Self-Mailer (PCOS). PCOS mailer should be ordered from the respective Volunteer Technician from the National Office.</td>
<td>• Send email address of PVC or designee to the National Office at <a href="mailto:taxaide@aarp.org">taxaide@aarp.org</a> so that they may forward prospects who register via the web site.</td>
</tr>
<tr>
<td>• Potential sources for PVCs are persons with disabilities, someone who did not pass the test, or someone who may not want to counsel any longer.</td>
<td>• Establish a back-up person to assume PVC duties in case of travel, illness, etc.</td>
</tr>
<tr>
<td>• Train and supervise PVCs or designee to carry out intake and tracking responsibilities of the 888 number (1-888-227-7669). Instructions will be available on the Extranet soon.</td>
<td>• Establish contact with AARP Driver Safety Program counterpart to swap incorrectly placed messages.</td>
</tr>
<tr>
<td>• Personalize outgoing 888# voicemail box messages, tailoring them to local needs. Specify e-file recruitment needs.</td>
<td>• Encourage DCs &amp; PVCs to be flexible in receiving late recruits, even those received during the season. Possible uses for them include greeters at sites or to help with communication needs. Some late recruits are allowed to prepare taxes for clients even if they miss training by self-studying and working closely with a seasoned counselor once they pass the test and are certified.</td>
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### C. VOLUNTEER SUPPORT: 1) Recruitment: c) TV/Radio/Internet

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<tr>
<th>Things State Coordinators Should Know</th>
<th>Things State Coordinators Should Do</th>
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<tbody>
<tr>
<td>• 30-second public service announcements (PSAs) for TV &amp; radio are available for volunteer recruitment (fall &amp; early winter), program promotion (winter), and e-filing. The PSAs are available in English and Spanish.</td>
<td>• Encourage CCs/DCs to send these spots out to local TV and radio stations.</td>
</tr>
<tr>
<td>• Refer to the Communications Management Guide for information on ordering audio and video PSAs.</td>
<td>• <a href="http://www.volunteermatch.org">www.volunteermatch.org</a> is free, accessible, and easy to use. AARP has a partnership with VolunteerMatch. Updated information will be forth coming on the partnership. However, in the interim, encourage its use by PCRs, CCs, and DCs to recruit volunteers, especially, but not limited to e-filing.</td>
</tr>
<tr>
<td>• The Internet has websites that can help you advertise for volunteers, such as <a href="http://www.volunteermatch.org">www.volunteermatch.org</a>.</td>
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</table>
C. VOLUNTEER SUPPORT: 1) Recruitment: d) PCS & CC Roles

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
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<tbody>
<tr>
<td>• The Partnerships and Communications Specialist (PCS) is a statewide position and reports to the SC. The Communications Coordinator (CC) is district level and recruited by and reports to the District Coordinator (DC).</td>
<td>• Emphasize the role of partnerships with the PCS. Partnerships can be with a variety of entities and for a variety of resources. (See section on partnerships.)</td>
</tr>
<tr>
<td>• The PCS identifies, develops and oversees partnerships with other organizations. Partnerships are needed to increase the program’s ability to serve taxpayers and/or secure needed resources including computers, volunteers or sites with equipment for program volunteers to use to e-file.</td>
<td>• Encourage PCS and CCs to use the Communication Management Guide as a reference to generate recruitment and publicity press releases.</td>
</tr>
<tr>
<td>• PCS responsibilities also include addressing recruitment needs and promoting the program. Although they may directly handle some local media, PCSs will be more focused on state level publications and training CC/DCs as to how to obtain local media coverage.</td>
<td>• Ask the AARP State Office for assistance on publicity and recruitment needs for the year.</td>
</tr>
<tr>
<td>• Ensure that the PCS is involved in program planning and creates an annual statewide communications plan.</td>
<td>• Develop recruitment and program publicity plans with PCS, CCs, and DCs.</td>
</tr>
<tr>
<td>• Communication needs are pervasive in every district. The CC position itself is optional but strongly encouraged to ensure local media coverage.</td>
<td>• Ensure that PCS and DCs/LCs/CCs generate recruitment &amp; site publicity.</td>
</tr>
<tr>
<td>• The PCS and CC do not have to be knowledgeable about taxes and therefore more options should be considered for recruitment.</td>
<td>• Review partnerships, promotion and recruitment results with DCs and PCS at year-end.</td>
</tr>
</tbody>
</table>

C. VOLUNTEER SUPPORT: 1) Recruitment: e) SC Feedback
### Things State Coordinators Should Know:  

- The National Leadership Team (NLT) needs SC feedback on national and state partnership and recruitment efforts in order to develop more effective future strategies.

### Things State Coordinators Should Do:  

- Provide ideas about better partnership and recruitment strategies to your Regional Coordinator (RC) for NLT consideration.
- Share best practices with Fran Brenneman and Tina Purser Langley in AARP Tax-Aide National Office at fbrennemen@aarp.org or tplangley@aarp.org.

### C. VOLUNTEER SUPPORT: 1) Recruitment:  f) Local Institutions

#### Things State Coordinators Should Know:  

- There are limitless possibilities for local institutions as partners (e.g., computer clubs, AAAs, motorcycle clubs, PTAs, service clubs, retired military, military wives clubs, industry and business, churches, local AARP/NRTA Chapters).

#### Things State Coordinators Should Do:  

- Ask DCs, in cooperation with PCS, to commit to making at least one new local contact, encouraging creative thinking.
- Ask DCs to make one new contact with a diverse group for purposes of recruiting diverse volunteers or increasing program delivery to diverse groups.
- Follow-up with DCs and PCS to determine effectiveness of these new contacts.
- Share successes with other DCs, PCSs, CCs, your RC, and AARP Tax-Aide National Office (Fran Brenneman and Tina Purser Langley).
**C. VOLUNTEER SUPPORT: 1) Recruitment: g) Diversity**

<table>
<thead>
<tr>
<th><strong>Things State Coordinators Should Know:</strong></th>
<th><strong>Things State Coordinators Should Do:</strong></th>
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<tbody>
<tr>
<td>- AARP Tax-Aide practices an inclusive volunteer recruitment policy, including age as a diversity factor. AARP membership is not required except at the state and regional coordinator positions.</td>
<td>- Ask DCs, and/or PCSs to approach community leaders for entry into diverse communities.</td>
</tr>
<tr>
<td>- The National Office is pursuing partnerships for recruitment that may bring diversity as it relates to race, gender, and age to our volunteer cadre.</td>
<td>- Solicit from DCs, PCSs &amp; CCs and disseminate positive examples of recruitment in diverse communities.</td>
</tr>
<tr>
<td>- State tax agencies and AARP in your state may have effective connections with diverse communities.</td>
<td>- Ask DCs, and/or PCSs to contact institutions typically for young people (e.g., community colleges) for recruitment help. This is a good source for e-filing volunteers and administrative help for DCs (roster, site, site review, etc).</td>
</tr>
<tr>
<td>- AARP Tax-Aide program promotion and recruitment brochures as well as posters, site flyers &amp; countertop holders are available in Spanish.</td>
<td>- Ask DCs to establish evening and weekend sites as a way of recruiting and accommodating new, not yet retired volunteers.</td>
</tr>
<tr>
<td>- When using the 888 number, 1-888-AARPNOW (888-227-7669), prospective Spanish speaking volunteers/customers are now able to press the number three to be transferred out of the 888 number automated system to a Spanish speaking assistor (live--not automated) at the AARP call center.</td>
<td>- Encourage recruitment of bi-lingual counselors and non-counselors in highly diverse areas to meet the needs of non-English speaking customers.</td>
</tr>
<tr>
<td>- AARP Tax-Aide has a growing need for evening and weekend sites to attract new volunteers and customers.</td>
<td>- Recruit interpreters - (sign language and other languages) as counselors and non-counselors to assist non-English speaking customers as needed.</td>
</tr>
<tr>
<td>- AARP Tax-Aide will participate in the overall initiative in Hispanic and African American outreach. We hope to increase numbers of Latino and African American volunteers and customers, as well as share successes with other states.</td>
<td>- Form partnerships with local chapters of diverse organizations.</td>
</tr>
<tr>
<td>- AARP Tax-Aide provided a workshop to college and high school students who were interested in volunteering as tax counselors or computer assistants.</td>
<td>- Ask your Territory Manager and state tax agencies in your state if they are doing any diversity outreach in which you can participate on behalf of AARP Tax-Aide.</td>
</tr>
<tr>
<td>- State vocational organizations, colleges and high schools are all good sources for new volunteers.</td>
<td>- Ask your AARP State office for assistance in diversity recruitment.</td>
</tr>
<tr>
<td></td>
<td>- College students may not stay with the program for many years, but may come back to the program when they have time to volunteer again. It helps meet the short term need and may address long term needs as well.</td>
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</table>
C. VOLUNTEER SUPPORT: 2) Training: a) Scope of Program

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
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</tr>
</thead>
<tbody>
<tr>
<td>• AARP Tax-Aide has no income thresholds; complexity of return determines our ability to serve.</td>
<td>• Have frank conversations with DCs about identifying their personal biases and check that those</td>
</tr>
<tr>
<td></td>
<td>biases don’t affect recruitment and service decision negatively.</td>
</tr>
<tr>
<td>• Volunteers are not to deal with topics with which they have no current professional experience, or</td>
<td>• Reinforce scope of program to everyone in the state. Share the need to continue to reach out</td>
</tr>
<tr>
<td>on which they have not received IRS or AARP Tax-Aide training.</td>
<td>to potential volunteers who are “younger” to ensure the longevity of the program.</td>
</tr>
<tr>
<td>• AARP membership is not required to be an AARP Tax-Aide counselor or customer.</td>
<td>• Encourage adding volunteers, opening a neighboring site or making appointments at sites where</td>
</tr>
<tr>
<td></td>
<td>customers, especially those age 60 or older, must wait long periods of time for service.</td>
</tr>
<tr>
<td>• The program's official tagline which should appear on all promotional materials is:</td>
<td>• Ensure that AARP Tax-Aide sites either: 1) become appointment only sites; or 2) give “priority</td>
</tr>
<tr>
<td>&quot;AARP Tax-Aide is the nation's largest, free, volunteer-run tax counseling and preparation service</td>
<td>service” to those age 60 and older.</td>
</tr>
<tr>
<td>offered to taxpayers with low- and middle-income, with special attention to those age 60 and older.&quot;</td>
<td></td>
</tr>
<tr>
<td>• Counselors commit at the outset to subordinate their personal biases or mindsets about who AARP</td>
<td>• Advise DCs about the requirement to use the small program poster, ensure message delivery</td>
</tr>
<tr>
<td>Tax-Aide serves; Coordinators should do the same.</td>
<td>through state program structure, and, ultimately, usage (posting) at all program sites.</td>
</tr>
<tr>
<td></td>
<td>You should not additionally post the IRS flyer with civil rights language.</td>
</tr>
<tr>
<td>• At sites serving other than an incidental number of taxpayers under age 60, &quot;priority service,&quot; per</td>
<td>• Abide by the Civil Rights language: “Under no circumstances will the Internal Revenue Service</td>
</tr>
<tr>
<td>the TCE grant, needs to be given to those 60 and older. Appointments can be made for all, thereby</td>
<td>tolerate discrimination by its employees, grantees, contractors, and/or subcontractors. NO ONE</td>
</tr>
<tr>
<td>eliminating most waiting time, or those age 60 and older should be helped first.</td>
<td>shall be excluded from participating in, be denied benefits of, or be subject to discrimination</td>
</tr>
<tr>
<td></td>
<td>because of: race, color, sex, national origin, disability, reprisal, or age in programs or</td>
</tr>
<tr>
<td>• The IRS requires that Civil Rights language be posted at all TCE sites (this includes AARP Tax-Aide</td>
<td>activities funded by the Department of Treasury---Internal Revenue Service. Any person who</td>
</tr>
<tr>
<td>sites). The language has been incorporated on the smaller AARP Tax-Aide poster with the box for noting</td>
<td>believes that he/she has been discriminated against on the basis of race, color, sex, national</td>
</tr>
<tr>
<td>local site information. <strong>This poster must be posted at ALL sites during operating hours.</strong></td>
<td>origin, disability, reprisal, or age in program or activities receiving financial assistance</td>
</tr>
<tr>
<td>• The Civil Rights language: “Under no circumstances will the Internal Revenue Service tolerate</td>
<td>(e.g. Low-Income Tax Clinics, Tax Counseling for the Elderly) from the Department of Treasury---</td>
</tr>
<tr>
<td>discrimination by its employees, grantees, contractors, and/or subcontractors. NO ONE shall be</td>
<td>IRS may submit written complaint to: Director, Office of Equal Opportunity Program, Department</td>
</tr>
<tr>
<td>excluded from participating in, be denied benefits of, or be subject to discrimination because of:</td>
<td>of Treasury, 1500 Pennsylvania Avenue NW, Metropolitan Square, Room 6071, Washington, D.C.</td>
</tr>
<tr>
<td>race, color, sex, national origin, disability, reprisal, or age in programs or activities funded by</td>
<td>2020.</td>
</tr>
</tbody>
</table>
discriminated against on the basis of race, color, sex, national origin, disability, reprisal, or age in program or activities receiving financial assistance (e.g. Low-Income Tax Clinics, Tax Counseling for the Elderly) from the Department of Treasury---IRS may submit written complaint to: **Director, Office of Equal Opportunity Program, Department of Treasury, 1500 Pennsylvania Avenue NW, Metropolitan Square, Room 6071, Washington, D.C. 20220.**
C. VOLUNTEER SUPPORT:  

2) Training:  b) Counselors

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The IRS training materials, both Student Guide and Instructor Guide, and the Test/Retest are organized into three segments: Basic, Wage Earner and Pension Earner.</td>
<td>• With the TRS, ensure DC understanding of the new training segmentation allowing DC to make appropriate decisions about test segments to be passed before counseling at individual sites.</td>
</tr>
<tr>
<td>• The segments in the training materials are composed as follows:</td>
<td>• After the tax season, assess impact of the new training materials, test and decisions about required segments by sites by getting feedback from DCs and Instructors. Pass this feedback to Regional Coordinators and the Training Committee. The Training Committee serves as a repository for field feedback and will prepare a summary of recommendations on behalf of AARP Tax-Aide to send to SPEC Headquarters, Chief, Education &amp; Product Development with responsibility for VITA/TCE Training.</td>
</tr>
<tr>
<td>➢ Basic – Getting Started (exemptions, filing status, who should file, which form to use), Income, Adjustments, Standard and Itemized Deductions, Credit for Qualified Retirement Savings Contributions, Miscellaneous Credits, Schedule C-EZ, and Finishing the Return.</td>
<td></td>
</tr>
<tr>
<td>➢ Wage Earner – Child Tax Credit, Education Credits, Child and Dependent Care Credit, and Earned Income Credit.</td>
<td>• Ensure ordering (but not over ordering) of Counselor Materials; they are not sent automatically.</td>
</tr>
<tr>
<td>➢ Pension Earner– Sale of Stock, Sale of Home, and Retirement Income.</td>
<td>• Since all Instructors report to DCs emphasize with DCs that they insure that each of their Instructors knows of the additional administrative requirement to report the specific segments of the test/retest that each Counselor passed or failed.</td>
</tr>
<tr>
<td>• The test/retest is composed of the same three segments: Basic, Wage Earner, and Pension Earner.</td>
<td>• Ensure all Instructors provide emphasis to their DCs and Counselors about the new site identification number (SIDN) that will be used throughout AARP and IRS SPEC. The site identification number (SIDN) should be entered in the paid preparer SSN field on all returns prepared at the volunteer sites. PLEASE COMMUNICATE THROUGHOUT YOUR STATE STRUCTURE THAT IT IS IMPERATIVE THAT THE SIDN BE WRITTEN OR STAMPED ON ALL PAPER RETURNS. IN ADDITION, FOR E-FILED RETURNS, THE DEFAULT CAN BE PRE-SET ON ALL...</td>
</tr>
<tr>
<td>• VITA and TCE volunteers are certified by passing the Basic Segment plus one of the other two segments, Wage Earner or Pension Earner. The National Leadership Team has vested the responsibility for determining which parts of the test AARP Tax-Aide Counselors will need to pass with the District Coordinator. District Coordinators shall determine, based on individual site requirements, whether experienced AARP Tax-Aide Counselors must take all three segments in order to provide proper service at their site. It is expected that District Coordinators will not set blanket policy in this matter but will make that determination for each individual site. Beginning AARP Tax-Aide Counselors are not to be required to take all three segments.</td>
<td>• First year volunteers who have certified in only two segments at a site requiring all three segments should be teamed with more experienced counselors to make sure all customers requesting assistance at that site can be helped.</td>
</tr>
<tr>
<td>• First year volunteers who have certified in only two segments at a site requiring all three segments should be teamed with more experienced counselors to make sure all customers requesting assistance at that site can be helped.</td>
<td>• The administrative procedures tape is no longer relevant and will be deleted from AARP’s inventory.</td>
</tr>
<tr>
<td>• Instructors are to indicate on the Class Roster, which</td>
<td>• Instructors are to indicate on the Class Roster, which...</td>
</tr>
</tbody>
</table>
segments each Counselor passed. The TRS, ADS and IRS Tax Specialist for the state are each furnished copies of that roster.

Volunteer Training products include:
• Pub 1155 Instructor Guide
• Pub 678 Volunteer Assistor's Guide
• Form 6744 Test
• Form 6745 Retest
• Pub 4189 Test Answer Key
• Pub 3888 Condensed VITA (C-VITA)
• Pub 1278 Volunteer Plastic Bag

Resources:
• Pub 17
• Pub 525 Highlight of Changes
• Pub 678M Military Supplement
• Pub 910 Free Tax Services
• Pub 575 Pensions and Annuities
• Pub 554 Tax Guide for Older Americans
• Pub 4012 Quick Reference Guide
• Form 1040X and Instructions

Volunteers may prepare amended (1040X) and military returns only if they are trained to do so. AARP Tax-Aide TRS and trainers can use the Pub 678 Military Supplement, as well as the instructions for the 1040X Form, to train volunteers on these topics if needed at specific AARP Tax-Aide sites. (As always, Counselors cannot be reimbursed for assistance after April 15.)

To ensure the accuracy of IRS generated counts, all volunteers must be taught about and told to use site identification numbers (SIDN).
### C. VOLUNTEER SUPPORT: 2) Training: c) DCs & LCs

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• One of the most important responsibilities of the SC is to adequately train DCs, especially new ones.</td>
<td>• Incorporate DC training into state meetings. State meetings should be at least a daylong and should spend time on training as well as planning.</td>
</tr>
<tr>
<td>• The <em>SC Management Guide</em> (this one) includes in the appendix the essential topics to be covered with your DCs.</td>
<td>• Ask DCs to use the <em>LC Digest</em> for their training of LCs, and remind people of the assessment form.</td>
</tr>
<tr>
<td>• DCs are responsible for LC training.</td>
<td>• Encourage the volunteers to follow the chain of command and address issues or ask questions to their supervisor.</td>
</tr>
</tbody>
</table>

### C. VOLUNTEER SUPPORT: 2) Training: d) SMT

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• New SMT members appointed during the past year were offered training in August.</td>
<td>• Collect feedback from training participants, and share observations with Regional Coordinators.</td>
</tr>
<tr>
<td>• A evaluation form for SMT training which asks for feedback will be used to evaluate the training. After the season, in April or May, a follow-up evaluation will be used to assess effectiveness.</td>
<td>• Encourage newly trained SMT to provide the requested evaluations/assessments.</td>
</tr>
<tr>
<td></td>
<td>• Encourage all members of SMT to network with their counterparts in other states (conference calls, e-mail, etc.).</td>
</tr>
</tbody>
</table>

### C. VOLUNTEER SUPPORT: 3) Feedback: a) Assessment Form

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• This season’s form has submission dates.</td>
<td>• Remind DCs that the form is in the Digests and packets, and potentially rich feedback is on backside (page 2) of the form.</td>
</tr>
<tr>
<td>• Your state summary assessment form is due to your Regional Coordinator by May 15.</td>
<td>• SCs may want to collect page 2 feedback from LC reports.</td>
</tr>
<tr>
<td></td>
<td>• Encourage participation and walk through procedures for submission.</td>
</tr>
</tbody>
</table>
C. VOLUNTEER SUPPORT:

3) Feedback: b) Customer and Volunteer Surveys

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
</tr>
</thead>
</table>
| • AARP Tax-Aide customer satisfaction surveys were distributed to taxpayers this season through the tax record envelopes. Two hundred thousand of them have been returned. | • Share with AARP Tax-Aide volunteers the results of the survey.(see survey results on page 37 for other information)  
  1. Satisfaction with the service remains extremely high  
  2. Taxpayers aged 60 and older are still the primary users  
  3. Diversity has increased by over 50% |
| • Survey produced enough responses to have valid results for most states. A portion of the national survey results are provided in this State Coordinator’s Guide as a reference. | • Order new envelopes as they will have the surveys and USE THOSE FIRST as we expect to have sufficient surveys return again this coming tax season to gather national results. |

C. VOLUNTEER SUPPORT: 4) Materials: a) Management Guides

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Management guides have been produced for SC, ADS, PCS/CCs, TCS/TCs, and TRS.</td>
<td>• Read this SC Management Guide, and encourage the rest of the SMT to read theirs.</td>
</tr>
<tr>
<td>• SCs &amp; NLT will receive a complete set, and all guides will be available on the Extranet at <a href="http://www.aarp.org/tavolunteers">www.aarp.org/tavolunteers</a>).</td>
<td>• Ensure that new appointees receive their guides and are trained.</td>
</tr>
</tbody>
</table>

C. VOLUNTEER SUPPORT: 4) Materials: b) Logo & Branding

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• All promotional materials must include the AARP Tax-Aide Foundation logo and sites should display program promotional materials available from Fulfillment (see order form in Handbook).</td>
<td>• Order a full set of materials from Fulfillment to &quot;Show and Tell&quot; at your state meeting.</td>
</tr>
<tr>
<td>• The statement, &quot;Administered by the AARP Foundation in cooperation with the IRS,&quot; is required on all AARP Tax-Aide materials and formal correspondence.</td>
<td>• All sites should be giving tax record envelopes. Tax Record envelopes are expensive and should NOT be used by EROs for holding taxpayer’s e-filing documentation individually.</td>
</tr>
<tr>
<td>• Our posters will reflect our tag line, “We serve low- and middle-income taxpayers with special attention to 60+.”</td>
<td>• Emphasize that we have materials available from Fulfillment and all DCs and LCs are encouraged to order them. The order form is in the Handbook.</td>
</tr>
<tr>
<td>• The small poster includes the IRS-required Civil Rights language and must be used at all sites.</td>
<td>• Advise all volunteer leaders and site captains that the AARP Tax-Aide poster with civil rights language must be displayed at ALL sites.</td>
</tr>
</tbody>
</table>
C. VOLUNTEER SUPPORT: 4) Materials:  c) Summary Activity Rollups, Site & Order Forms

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
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</tr>
</thead>
<tbody>
<tr>
<td>• The old CAR forms cannot be used to report program activity. Program activity is to be collected at the site level via sign-in sheets and tabulated and reported by the Local or Site Coordinator to the ADS in the manner prescribed by the SC.</td>
<td>• SC and SMT determine statewide instructions for submitting site level statistics to the ADS who will summarize all state data and submit state totals to National Office each reporting period.</td>
</tr>
<tr>
<td>• The ADS will summarize the state’s data for the reporting period and send the state totals for all columns and Box 9 (Counseling Hours) to National Office. The individual reporting periods’ data must be clearly identified.</td>
<td>• Review the examples of the correct way to record taxpayer interviews on the Site Sign-in Sheets that are in the Digests, including how to capture Q and A only.</td>
</tr>
<tr>
<td>• For quality control purposes, SITE level statistics still need to be maintained by the states. Even though the IRS will be collecting numbers of federal returns processed directly by using the Site Identification Numbers (SIDN) reported on paper and e-filed returns, the TCE grant still requires AARP Tax-Aide to submit separately calculated activity counts. Although much improvement was shown last season, the IRS has credited us with significantly less paper federal returns than we show via the program’s reporting system. Until, if and when, IRS statistics are shown to be reliable at the site level, we will need to record AND MAINTAIN site level statistics. The ADS IS TO KEEP THE SITE RECORDS FOR THE STATE until September 30, the end of the grant year.</td>
<td>• Advise leaders to destroy sign-in sheets after data is transferred to summary sheets. Also advise them to never record SSNs on sign-in sheets. Have leader convey this message to Counselors as appropriate.</td>
</tr>
<tr>
<td>• Once data is transferred from the sign-in sheet to a local level summary record, the sign-in sheet should be destroyed. The site level summary data is sufficient back-up for our purposes. Sign-in sheets with taxpayer names should not be maintained. Due to concerns about identity theft, NEVER have taxpayer record their SSN on the sign-in sheet.</td>
<td>• Point out the site form warning about contact names being publicized to DCs, and insist that they tell others.</td>
</tr>
<tr>
<td>• National office report period ending dates are 3/31, 4/30 and 9/15. ADSs are to submit the state’s totals for each reporting period to reach national office as soon as possible following the reporting period end dates but to arrive NO LATER THAN 4/21 for the report period ending 3/31; 5/18 for the report period ending 4/30; and 9/25 for the report period ending 9/15.</td>
<td>• Wait until administrative packets are received before ordering materials, and use cherry envelope or fax (202-434-6987) for orders.</td>
</tr>
<tr>
<td>• ADS may send state totals by fax or email to</td>
<td>• Identify e-file sites on site list this year. After site lists are sent to the National Office, use site information forms to report additional sites adding e-filing.</td>
</tr>
<tr>
<td></td>
<td>• Read the back of forms for instruction.</td>
</tr>
<tr>
<td></td>
<td>• Walk the DCs through the distribution schedule on page 91 of the Coordinator Handbook.</td>
</tr>
<tr>
<td></td>
<td>• SC with the TRS determine statewide instructions for ordering all items for Counselor Classes and site use that were previously distributed via the Counselor Packets: Counselor Digests, Name cards and Plastic Holders, Blue Volunteer Ribbons and Tell-A-Friend Cards.</td>
</tr>
</tbody>
</table>
Luisa Chaoui at (202) 434-6026 or ltchaoui@aarp.org. The data may also be sent by regular mail to AARP Tax-Aide, 601 E Street, NW, Washington, DC 20049, ATTN: Luisa Chaoui.

- To capture Q&A only assistance, write the taxpayer name or “Q & A” in the taxpayer’s name column on site sign-in sheets. Place a checkmark in the “Joint Return” and “Shut-in” columns if applicable.

- Training tools for the sign-in sheets are in the Counselor and LC Digests.

- Please note the site information warning that “Contact Person will get calls from the public.

- AARP needs to establish which sites are e-file sites on our site lists as this information drives the e-file sites listed on the 888# and web site

- All Instructors, including Coordinator/Instructors, at the Instructor Workshop will get a copy of the Instructor Digest in the Instructor Packet.

- COUNSELOR PACKETS WILL NOT BE PRODUCED AGAIN THIS YEAR.
### C. VOLUNTEER SUPPORT: 5) Reimbursement Issues

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• All volunteers must wait until April 15 to submit their itemized counseling &quot;I&quot; expenses.</td>
<td>• Ensure DCs understand and convey to LCs the policies for claiming itemized counseling expenses. Leaders may submit other types of expenses throughout the year but not &quot;I&quot; expenses.</td>
</tr>
<tr>
<td>• SCs set the threshold for “I” expenses above which expense statements must be submitted to the SC, or his/her designee, for approval before forwarding to the National Office.</td>
<td>• Set a reasonable threshold for “I” expenses above which SC approval is required.</td>
</tr>
<tr>
<td>• SC, DCs, or Instructors can now be reimbursed UP TO $1.50 per Counselor per training session for coffee or any other light refreshments (not per day, a one-time reimbursement only of $1.50 per Counselor attending training period). RECEIPTS ARE REQUIRED.</td>
<td>• Advise DCs and Instructors of the new reimbursement policy for Counselor trainings and that mileage to/from end-of-season recognition activities was never meant to be reimbursed and is not reimbursed and is now specifically excluded in policy.</td>
</tr>
<tr>
<td>• Meals and refreshments during Counselor classes (except as noted above) and when counseling are NOT reimbursable for any volunteer except in rare cases when the SC authorizes overnight stays.</td>
<td>• SC must provide his/her approval signature on the expense statement for meals incurred during authorized overnight stays.</td>
</tr>
<tr>
<td>• Mileage claims must be properly documented: each date of travel, purpose, and roundtrip mileage.</td>
<td>• SC must review the reimbursement policies with the DCs, with special attention to the changes, to ensure all volunteers will receive correct guidance.</td>
</tr>
<tr>
<td>• Mileage claims not properly documented will be denied and rejection letters sent to the volunteer with copies to the supervisor, SC, and RC.</td>
<td></td>
</tr>
<tr>
<td>• Reimbursable telephone expenses are limited to the itemized, individual calls made on behalf of the AARP Tax-Aide program.</td>
<td></td>
</tr>
<tr>
<td>• Required documentation for reimbursable telephone expense is a copy of the itemized monthly statement, listing individual calls and their duration, with those made on behalf of the program duly noted.</td>
<td></td>
</tr>
<tr>
<td>• Required documentation for purchased telephone cards is both the purchase receipt and a log of the individual calls and duration. Calls must be made on behalf of the program.</td>
<td></td>
</tr>
<tr>
<td>• Rejection letters will be sent for items claimed that are listed in the handbooks as non-reimbursable, with copies sent to the supervisor, SC and RC.</td>
<td></td>
</tr>
<tr>
<td>• If an item is not addressed in the handbooks, it probably is not reimbursable. ASK BEFORE INCURRING THE EXPENSE.</td>
<td></td>
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</tbody>
</table>
The reimbursement policy was rewritten to clarify that mileage cannot be reimbursed for end-of-season recognition functions.

C. VOLUNTEER SUPPORT: 6) Partnerships & Coalitions

<table>
<thead>
<tr>
<th>Things State Coordinators Should Know:</th>
<th>Things State Coordinators Should Do:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Partnerships can provide valuable resources including computers, new sites, promote the program and recruit volunteers.</td>
<td>• Discuss program needs with SMT.</td>
</tr>
<tr>
<td>• Partnerships can be with corporate, non-profit, other service organizations, professional firms and others.</td>
<td>• Research potential partners.</td>
</tr>
<tr>
<td>• Partnerships can be formed with the AARP State Office in your state.</td>
<td>• Prepare a list of program needs in your state and possible benefits for partner.</td>
</tr>
<tr>
<td>• Partnerships should be mutually beneficial.</td>
<td>• Before approaching potential partner, discuss with RC and National Communications Coordinator (Fran Brenneman 1-800-424-2277 ext. 6001 or <a href="mailto:fbrenneman@aarp.org">fbrenneman@aarp.org</a>). (If in doubt, call RC and Fran).</td>
</tr>
<tr>
<td>• Partnership projects with the AARP State Office should be discussed with the National State Partnership and Communications Coordinator Tina Purser Langley in the National Office.</td>
<td>• For AARP State Office partnership projects contact Tina Purser Langley 1-800-424-2277 ext 2043 or tplangleyaarp.org. If in doubt call RC and Tina).</td>
</tr>
<tr>
<td>• Partnerships that are beyond the &quot;local category&quot; should be discussed with the RC and National Partnerships and Communications Coordinator (Fran Brenneman) before approaching potential partner.</td>
<td>• Strongly consider inviting AARP State staff to a meeting with a potential partner. AARP has resources that they may be able to offer that could help make a great deal with the potential partner for AARP Tax-Aide. (See earlier section “Planning- AARP State Planning &amp; State Office” for more information on contacts at the State Office.</td>
</tr>
<tr>
<td>• Partnerships are being established at the National Level with National Disabilities Institute, Future Business Leaders of America, The Elfun Society (the volunteer division of General Electric) and Grisoft.</td>
<td>• Contact partner and notify RC and Fran (1-800-424-2277 ext. 6001) of results.</td>
</tr>
<tr>
<td>• National relationships will continue with Marriott International Inc, and be expanded with Veteran’s Administration Hospitals, and the National Society of Collegiate Scholars.</td>
<td></td>
</tr>
<tr>
<td>• Partnerships will be established at the national level with other groups in some states (if RC and SC agree).</td>
<td></td>
</tr>
<tr>
<td>• As part of the broader Community Service AARP initiative, targeted outreaches have begun in Memphis, Tacoma, Detroit, Bronx, Manhattan, Tampa, and Philadelphia.</td>
<td></td>
</tr>
<tr>
<td>• The PCS attends initial partnership meetings</td>
<td></td>
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</table>
with the State Coordinator and subsequent meetings as needed. Working with District and Communication Coordinators as appropriate, the PCS oversees development and implementation of the 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.

• 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 help, receiving computers or other tangible resources and/or have the inclination and time for networking to possibly acquire other needed program resources.

• If you should decide to participate in a coalition:
  1. Cost effectiveness should be considered when sending representatives to coalition/partnership meetings.
     a. State-wide partnership meetings should include the PCS and the SC. After the initial meeting, the PCS will be available to do available all follow-up work to help ensure a successful partnership.
     b. Coalitions that are limited to a specific geographic area, such as a large city, should include the SC, PCS, and DC at the initial meetings. The PCS can do necessary follow-up to help ensure the success of the partnership and/or coalition, while the SC and DC are involved with other activities. Subsequent meetings should be attended by those who live close to the location of the meeting and will be involved in the direct implementation. As the SC, your buy-in and understanding of a new direction for the program in your state, is important. The PCS should be involved with any necessary follow-up. However, if you feel it is too costly to send both yourself and the PCS to the first one or two meetings, please call your RC and discuss less costly alternatives.

2. **ORIENTATION- About AARP Tax-Aide**
Who We Are

AARP Tax-Aide is the nation’s largest free volunteer-run tax counseling and preparation service, preparing tax returns and answering tax questions free of charge. AARP Tax-Aide is administered by the AARP Foundation in cooperation with the IRS.

Who We Serve

AARP Tax-Aide helps taxpayers with low- and middle-income, with special attention to those age 60 and older.

How Many Customers We Serve

During the 2004 tax season, from February 1 - April 15, we served over 1,878,000 customers. Over the past 36 years, we have served more than 36 million customers.

Where We Serve Our Customers

Most customers receive in-person counseling at one of the estimated 8,400 sites nationwide. 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 counseling is offered online at www.aarp.org/taxaide. Quality reviewed answers are sent to customers via e-mail within a few business days.

How Many Volunteers Serve

Over 32,000 volunteers make up AARP Tax-Aide. Virtually all provide tax counseling, and 6,500 are also volunteer leaders.

Program Structure & Administration

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 counselors provide all service-level tax counseling. Instructors provide tax training to counselors. Coordinators and specialists administer the program at the local, district, state, and regional levels.

Coordinator & Specialist Roles

Coordinators recruit and supervise volunteers at all levels. Local Coordinators (LCs) ensure volunteer recruitment and training, volunteer certification, site creation, site assignment, 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 operational policies. Communications Coordinators (CCs) and Technology Coordinators (TCs) support their specialty interests at the local and district 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).

National Leadership Team & National Office Staff

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 technology and training. National office staff helps set program policies, maintains relationships with IRS and other key partners, provides administrative support to volunteer leaders, and collects/reports administrative data and program impact.
### About AARP Tax-Aide continued

<table>
<thead>
<tr>
<th>Electronic Filing</th>
<th>AARP Tax-Aide offers free electronic filing at more than 3,300 sites nationwide using IRS provided tax preparation software.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Tax Counseling</td>
<td>In 1998, AARP Tax-Aide launched its 24-hour year-round Internet tax counseling service at its web site (<a href="http://www.aarp.org/taxaide">www.aarp.org/taxaide</a>). Taxpayers can pose questions online and get quality-reviewed answers back within a few business days. Interested volunteers with web access can sign up online at <a href="http://www.aarp.org/tavolunteers">www.aarp.org/tavolunteers</a>. There volunteers will find a link to the online counseling registration form.</td>
</tr>
<tr>
<td>Web Page Features</td>
<td>Located at <a href="http://www.aarp.org/taxaide">www.aarp.org/taxaide</a>, our web site offers tax counseling, frequently asked tax questions, program information, volunteer opportunities, and from February 1 to April 15, program site location.</td>
</tr>
<tr>
<td>Telephone Sites</td>
<td>Telephone counseling is offered at six telephone sites around the country. It is a small but important part of our program.</td>
</tr>
<tr>
<td>CyberTax E-Mail Newsletter</td>
<td>Any program volunteer with e-mail is eligible to receive CyberTax, a nationwide e-mail newsletter containing periodic updates on the program, taxes, and IRS. E-mail your name, program position, and state to <a href="mailto:taxaide@aarp.org">taxaide@aarp.org</a> to join the CyberTax distribution list.</td>
</tr>
<tr>
<td>Volunteering Via Telephone and the Web</td>
<td>Volunteering with us is easy. Interested persons should call toll-free, 1-888-AARPNOW (1-888-227-7669) and follow the prompts. Or visit us at <a href="http://www.aarp.org/taxaide">www.aarp.org/taxaide</a> and complete the online volunteer recruitment form. Volunteering can be done in either tax counseling and/or leadership positions.</td>
</tr>
<tr>
<td>Tax counseling</td>
<td>Requires self or classroom training and successful completion of the IRS certification exam.</td>
</tr>
<tr>
<td>Leadership</td>
<td>Coordinates program delivery by volunteers at sites at the local, state, or regional level OR manages 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.</td>
</tr>
<tr>
<td>Volunteer Opportunities available in the following areas</td>
<td>Tax Counselors</td>
</tr>
<tr>
<td></td>
<td>Local or District Coordinators</td>
</tr>
<tr>
<td></td>
<td>Communications Coordinators</td>
</tr>
<tr>
<td></td>
<td>Technology Coordinators</td>
</tr>
</tbody>
</table>
# AARP Tax-Aide’s Customers
## Who They Are (from 2004 survey)

<table>
<thead>
<tr>
<th>Customer Age</th>
<th>11% 18-49</th>
<th>33% 70 - 79</th>
<th>8% 50-59</th>
<th>19% 80+</th>
<th>23% 60-69</th>
<th>6% No Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Marital Status</td>
<td>37% Married</td>
<td>29% Other</td>
<td>30% Widowed</td>
<td>4% No Answer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td>61% Female</td>
<td>34% Male</td>
<td>5% No Answer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Race/Ethnicity</td>
<td>78% White non-Hispanic</td>
<td>4% Hispanic</td>
<td>3% Native American</td>
<td>6% Black or African American</td>
<td>2% Asian/Pacific</td>
<td>1% Other</td>
</tr>
<tr>
<td>Household Income (Annual)</td>
<td>44% Under $20,000</td>
<td>16% $30,000-$49,000</td>
<td>24% $20,000-$29,000</td>
<td>11% No Answer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repeat Customers</td>
<td>26% Once</td>
<td>35% Four+ Times</td>
<td>37% Two - Three Times</td>
<td>2% No Answer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Working Status</td>
<td>66% Retired</td>
<td>25% Not Retired</td>
<td>5% No Answer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customers’ Proximity to Site</td>
<td>57% 0 - 3 miles</td>
<td>12% 6 - 9 miles</td>
<td>19% 4 - 5 miles</td>
<td>12% 10+ miles</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## 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>83%</td>
<td>15%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Helpfulness of Volunteers</td>
<td>84%</td>
<td>12%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Tax Knowledge of Volunteers</td>
<td>75%</td>
<td>20%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Would they recommend AARP Tax-Aide to others?</td>
<td>93%</td>
<td>5%</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

Who would help them with their taxes if they didn’t use AARP Tax-Aide?

- Pay for assistance: 52%  
- IRS: 35%  
- Self or friend: 8%  
- Would Not Have Filed Taxes: 1%

(Source: 2004 AARP Tax-Aide Customer Satisfaction Survey)
Counselor

Volunteer Organization Chart

AARP Tax-Aide

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

Local Coordinator (LC)

Technology Coordinator (TC)

Instructor (INS)

Communications Coordinator (CC)

District Coordinator (DC)

Prospective Volunteer Coordinator (PVC)

Technology Specialist (TCS)

Training Specialist (TRS)

Administrative Specialist (ADS)

Partnership/Communications Specialist (PCS)

State Coordinator (SC)

State Management Team (SMT)

Regional Coordinator (RC)

National Committee Chairs Technology, Training, Leadership

National Leadership Team (NLT) (Staff & Volunteers)

AARP Tax-Aide (National Office Staff)

AARP Tax-Aide is administered by the AARP Foundation in cooperation with the IRS.
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. In this section, you will find a brief overview of the AARP Foundation and AARP. This overview provides some basic information you should know.

AARP Foundation

The AARP Foundation is AARP’s affiliated charity. Foundation programs provide security, protection and empowerment for older persons in need. Free tax preparation is provided for low and moderate-income older individuals. Low-income older workers receive job training and placement they need to re-join the workforce. We help frail and disabled persons to manage their finances and others to avail themselves of public benefits for which they qualify. 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

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

#### AARP’s Vision

“A society in which everyone ages with dignity and purpose and in which AARP helps people fulfill their goals and dreams.”

#### AARP’s Mission

“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.”

#### 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.

### Community Service Programs

The *AARP Driver Safety* Program is the nation’s first and largest classroom driver refresher course especially designed for drivers age 50 and older. The course held locally, helps older drivers to update their driving skills to maintain mobility and independence. Course graduates may qualify for an auto insurance discount in a majority of states and the District of Columbia or a voluntary discount in the remaining states.

The AARP 2,700 Chapters are centers of community volunteerism and fellowship, offering a range of service...
programming that includes mentoring activities, food and clothing drives, friendly visits and much more.

The AARP NRTA works with local retired educators this program helps adults respond to the needs of school children and the broader community. Through partnerships, experienced educators take on a variety of volunteer assignments like helping high school student prepare for writing exams, providing school supplies and books, and gathering canned goods, clothing and toys for the holidays.

Other activities: AARP has formed key partnerships with Faith in Action, the National Council on the Aging, the American Association for Homes and Services for the Aged and other local organizations which offer AARP members new volunteer opportunities in the areas of home-and community-based care, nursing home quality, benefits outreach for low-income individuals, and youth mentoring. These issues are important to our members and their families.

### AARP’s Current National Membership

<table>
<thead>
<tr>
<th>Age &amp; Sex (Individuals)</th>
<th>Median Age= 65</th>
<th>44% Male</th>
<th>56% Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residence (Households)</td>
<td>74% Single Family</td>
<td>17% Attached/Apartment</td>
<td>9% Mobil Home</td>
</tr>
<tr>
<td></td>
<td>1% Group Home</td>
<td>3% Other</td>
<td></td>
</tr>
<tr>
<td>Community (Households)</td>
<td>19% Urban</td>
<td>33% Suburban</td>
<td>17% Rural</td>
</tr>
<tr>
<td>Marital Status (Households)</td>
<td>62% Married</td>
<td>20% Widowed</td>
<td>12% Divorced/Separated</td>
</tr>
<tr>
<td></td>
<td>4% Never Married</td>
<td>2% Significant Other</td>
<td></td>
</tr>
<tr>
<td>Ethnicity (Individuals)</td>
<td>90.9% Caucasian</td>
<td>4.5% African American</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.4% Hispanic</td>
<td>1.2% Asian/Pacific Islander</td>
<td></td>
</tr>
<tr>
<td>Employment (Individuals)</td>
<td>31% Full-time</td>
<td>14% Part-time</td>
<td>48% Retired</td>
</tr>
<tr>
<td>Education (Individuals)</td>
<td>11% Less than High School</td>
<td>34% High School Graduate/Technical</td>
<td></td>
</tr>
<tr>
<td></td>
<td>25% Some College/2 year</td>
<td>31% College Graduate +</td>
<td></td>
</tr>
</tbody>
</table>
AARP Tax-Aide Volunteer Position Description: State Coordinator (SC)

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

Purpose of Position: The State Coordinator directs all activities of the program in a state or, in some states, a designated subdivision of the state (sub-state).

Responsibilities of Position: Guided by the policies and procedures of the Association, the handbooks, and the direction and support of the Regional Coordinators, the State Coordinator:

⇒ Develops goals and objectives; strategies for program organization, expansion, and assessment; and conducts volunteer performance evaluation.
⇒ Provides leadership to the AARP Tax-Aide state (sub-state) management team in planning and carrying out the activities of the program.
⇒ Ensures compliance with program and grant requirements.
⇒ Uses demographic and geographic data to divide state (sub-state) into manageable districts and sites, which ensure service to target and diverse populations.
⇒ Recruits, appoints, trains, supervises, and evaluates the state management team specialists, District Coordinators, and Prospective Volunteer Coordinator.
⇒ Initiates partnerships and oversees implementation by the Partnership and Communications Specialist and coordinators.
⇒ Plans and conducts or attends AARP Tax-Aide leadership meetings as required.
⇒ Supervises volunteer expenditures and approves expense statements in accordance with program policies and procedures.
⇒ Ensures weekly sweep of 888# voicemail, monitors process and delegates sweep responsibility as needed.
⇒ Involves diverse populations in AARP Tax-Aide activities.
⇒ Works cooperatively with state AARP particularly the Executive Volunteer for Community Service on the Executive Council, State President, State Director and any Associate State Director assigned as program liaison.

Qualifications: The SC must have the ability to implement and supervise AARP Tax-Aide program and its volunteers in a state (sub-state). The SC must be a member of AARP, and must be able to work effectively with diverse populations.

Term of Service: The SC is appointed for a two year term in even-numbered years, contingent upon satisfactory annual review. Mid-cycle appointments are effective to the end of the current cycle. The SC may be reappointed for subsequent two-year terms not to exceed a total of six years.

Eligibility: The SC is not eligible for any other AARP or AARP Foundation volunteer position, and may not serve in any other AARP Tax-Aide leadership position.
**Time Required:** Time commitment varies according to geographic area and number of volunteers. The position demands more time from September to May, with the greatest commitment during fall planning and spring evaluation.

**Training Required:** The SC must acquire knowledge of all procedures associated with the program, as well as orientation to AARP. Familiarity with tax procedures is helpful but detailed tax knowledge is not required.

**Travel Required:** The SC is required to visit the sites and training locations to monitor operations, and to attend regional, subregional, state, and district meetings as necessary for performance of duties.

**Appointed By:** The SC is appointed by the AARP State President at the recommendation of the AARP Tax-Aide Regional Coordinator and National Office.

**Supervisor:** The SC reports directly to the AARP Tax-Aide Regional Coordinator.

**Scope of Authority:** The SC manages and implements program policies and procedures within a state (sub-state), and supervises the state management team specialists, District Coordinators and PVC.

**Working Relations:** The SC works closely with the Regional Coordinator, AARP leadership, and the IRS Territory Manager or Tax Specialist as required.

**Progress Review:** The SC’s performance is monitored on an on-going basis and reviewed annually by the Regional Coordinator.

**Available Resources:** The SC will be afforded the necessary guidance, training and materials needed to facilitate leadership responsibilities. Additional support and training are provided from the national staff, Regional Coordinator, and IRS staff. AARP Tax-Aide reimburses volunteers for covered program related expenses as set out in the Coordinators 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.
## 2 C. OVERALL CALENDAR ACTIVITIES FOR THE STATE

### August
- Planning for upcoming season
- Analysis of program needs
- Recruiting (especially leaders)
- Appointments of Coordinators, Instructors
- Distribution of Leadership Rosters
- Orientation of new State Coordinators
- Sites open
- Recruitment continues
- SC and SMT planning meeting or conference call
- Upgrading and return of All-Volunteer Roster and personnel forms
- Planning meeting with IRS for training and publicity
- Recruiting publicity campaign
- Submission of final expenses (fiscal year ends 9/30)
- Review and analysis of expense report

### September
- Sites continue operation
- Mid-season publicity
- Recruiting publicity campaign
- Submission of final expenses (fiscal year ends 9/30)
- Sites continue operation to 4/15
- Summary Activity Reporting
- Counselor expense statements processed

### October
- Mid-season publicity
- Counselor expense statements processed
- Collect end-of-season written program assessments
- Sites continue operation to 4/15
- Summary Activity Reporting
- Counselor expense statements processed

### November
- Plan Counselor classes
- Order site materials
- Planning site publicity
- State evaluation
- Coordinators’ expense statements processed
- Review and analysis of personnel reports
- Performance reviews (all leadership)
- Submit state program assessment to RC
- Analysis of IMF error report from IRS
- Wrap up season

### December
- Instructor Workshops
- Receipt and distribution of site lists
- Receipt and distribution of updated site list
- Instructor assignment for Counselor classes
- Counselor classes
- Reappointment process for SC and SMT
- Review and analysis of activity reports

### January
- Counselor classes
- Testing, grading, certification, assignment
- Site publicity
- Receipt and distribution of site lists
2D. STATE COORDINATOR ACTIVITIES SCHEDULE

August
⇒ Contact IRS Territory Manager or Tax Specialist, and state/local tax agencies (if any).
⇒ Review statistics from last season. Analyze program needs.
⇒ Prepare demographic analysis, identifying targeted areas for expansion.
⇒ Prepare preliminary state work plans.
⇒ Conduct performance review and reappoint District Coordinators.
⇒ Send letters to those who are not being reappointed.
⇒ Recruit new DCs (as needed).
⇒ Review documentation of new and reappointed Local Coordinators and Instructors, and select confirmation letter option.
⇒ Coordinate plan for review and updates of volunteer and site rosters with Administrative Specialists (ADS) including process for assigning site codes (SIDNs).

September
⇒ Conduct planning meetings with SMT members and develop state work plan for discussion and implementation by all volunteers.
⇒ Review Partnership and Communications Specialist work plan for state and begin recruitment.
⇒ Review Technology Specialist work plan for advancement of electronic filing.
⇒ Review Training Specialist (TRS) work plan, including Instructor Workshop dates and facilities; determine who will (1) order materials, (2) provide training on administrative procedures, and (3) provide certification lists to IRS.
⇒ Schedule planning meeting with DCs, to be held after regional planning meeting.
⇒ Submit final expense statement for all expenses incurred prior to 9/30 (end of fiscal year).

October
⇒ Attend regional planning meeting.
⇒ Hold state meeting, to be followed by DC meetings with Local Coordinators, or hold sub-state meetings with both DCs and Local Coordinators (LCs), as appropriate, for state planning, policy/procedure review and demographic assessment as well as determine state goals.
⇒ Help DCs set sub-state goals. Review all procedures, AARP Tax-Aide and IRS order forms and materials; determine quantity and distribution process with DCs and LCs.
⇒ Ensure that the PVC is forwarding the names of potential volunteers, which have been sent by National Office, to appropriate Coordinators and that the recruits are contacted (888 or Web).
⇒ Review Instructor Workshop agenda with TRS and number of instructors needed.
⇒ Assist and support DCs' efforts as needed.

November
⇒ Ensure that appropriate IRS training material requests (2333Vs) have been submitted to the IRS Territory Manager or Tax Specialist and distribution from IRS is on schedule.

December
⇒ Attend Instructor Workshop with TRS.
⇒ Ensure with ADS that procedures for submitting Summary Activity Reports on a timely basis are understood by all.
⇒ Visit selective Counselor classes and evaluate Instructors. (Also TRS responsibility.)
January
⇒ Visit selective Counselor classes and evaluate Instructors. (Also TRS responsibility.)
⇒ Verify site publicity and ensure that LCs are displaying posters or banners indicating when counseling will be available at that site.
⇒ Follow up with ADSs to ensure site lists are sent to all interested agencies.
⇒ Monitor submission of site lists to IRS Territory Manager and others as appropriate.
⇒ Confirm IRS supply order deliveries by spot-checking or with IRS Territory Manager.

February
⇒ Visit and evaluate a few selected counseling sites, observing quality review procedures and visibility of AARP Tax-Aide signs/posters.
⇒ Confirm that ADSs forwards corrected All Volunteer Roster and Personnel forms to national office after reviewing.
⇒ Have TRS issue any last-minute tax changes or interpretations, as appropriate.
⇒ Monitor program operations within state.

March
⇒ Visit sites.

April
⇒ Analyze Summary Activity Reports.
⇒ Prepare for season evaluation, ensuring assessment of operations at all levels.
⇒ Review work plan with DCs to measure accomplishments and propose solutions for improvements with RCs.
⇒ Visit sites.

May
⇒ Evaluate DCs and collect DC evaluation reports.
⇒ Complete Assessment Report for state and send to RC.
⇒ Thank DCs for season and urge all volunteers to submit final expense statements.

June
⇒ Receive appointment letter on appropriate cycle (every two years).
⇒ Appoint SMT on appropriate cycle (every two years).

As Required
⇒ Establish contacts with IRS Territory Manager, AARP State President and State Director, state tax coordinator (if any), and state office on aging.
⇒ Work cooperatively with AARP Executive Volunteer for Community Service, State President, State Director and others finding joint projects or other ways to benefit AARP Tax-Aide.
⇒ File accident report if any volunteer is injured while performing AARP Tax-Aide functions.
⇒ Approve specific expenses in advance before the expenditure is made.
⇒ Approve expense statements of volunteers reporting to SC.
⇒ Submit own expense statement monthly or quarterly.
⇒ Delegate, but monitor and ensure, weekly sweeping of 888# voicemail.
⇒ Order service pins.
3. EFFECTIVE LEADERSHIP

3A. THE ART OF LEADERSHIP

Effective leaders are frequently described by their behaviors. Because behaviors can be learned, so too can effective leadership be learned. Once these effective behaviors are mastered, leaders are able to:

* Make and achieve goals;
* Attract and energize followers;
* Serve the people they lead and the larger society as a whole;
* Inspire others to make and achieve their goals.

Inspiration is a necessary but insufficient component of leadership. There are functional responsibilities as well that include planning, communication, organization, delegation, and management. Seven key leadership behaviors seem important to effectiveness:

1. Adopting innovative approaches to meeting challenges, taking advantage of opportunities, and improving the organization.
2. Applying a strategic perspective of the future.
3. Generating excitement among others and inspiring them to achieve a common vision.
4. Communicating honestly, openly, and succinctly when speaking and writing.
5. Providing feedback in ways that empower others to do their best.
6. Focusing on production and maintaining momentum toward defined objectives.
7. Employing consensual decision-making processes.

Regularly ask yourself the following questions in order to stay on top of your game:

**What are my strengths and weaknesses as an AARP Tax-Aide State Coordinator?** Recognizing what you do well and what you can still learn is an important trait in an effective leader. When you are willing to go beyond your past accomplishments and expand your perspective and your skills, you set an example that helps others develop and grow as well.

**What am I doing to make sure that we’re headed in the right direction?** As a State Coordinator you must make sure that your team’s goals are well aligned and implemented in ways that are most relevant to your state. Your team must also agree with your direction, so build effective relationships with all of your team members.

**How am I making sure that we’re achieving results?** You should assess how you resolve problems, avert crises, attract and use resources, and obtain feedback on both outcomes and processes. Ask your team members for feedback about yourself, too.
3B. DELEGATION AND COACHING

AARP Tax-Aide’s State Management Team (SMT) structure is founded on the premise that State Coordinators cannot run everything themselves. A quick glance through the other volunteers’ position descriptions confirms this to be a reality. Delegation is an integral part of a State Coordinator’s job, and coaching simply comes with the territory.

State Coordinators have both line and “staff” positions reporting directly to them as illustrated in the chart on page 33. A quick review of these position responsibilities summarizes the degree of delegation required:

Line Position:
District Coordinators (DCs) carry out program operations within geographic portion of the state. This includes volunteer recruitment, site generation, program publicity, administrative procedures, and tax training.

“Staff” Positions:
Administration Specialists (ADSs) manage volunteer and site roster maintenance (a full time job in and of itself), counselor flat rate expense processing, Summary Activity Report completion, and miscellaneous forms submission and processing.

Partnership & Communications Specialists (PCSs) identify and oversee partnerships with other organizations, generate program publicity and recruit volunteers for the program through publicity, AARP and other partnerships.

Technology Specialists (TCSs) lead the development of e-filing capability, facilitate productive usage of e-filing software, and assess hardware capabilities/needs.

Training Specialists (TRSs) prepare instructors for the delivery of tax training, oversee the scheduling of counselor classes, assess instructor performance, and coordinate the counselor certification process.

Prospective Volunteer Coordinators (PVCs) sweep the voicemail boxes and receive responses (e-mailed and mailed) to recruitment publicity, do initial screening and referral of candidates, and send the Prospective Candidate Orientation Self-Mailer. Some State Coordinators add this role to another position, and some keep it as an independent position.

SMT consists of the four “staff” positions; ADS, PCS, TCS and TRS along with the SC. State Coordinators must assign clear roles or tasks and provide the authority to do them. But it doesn’t stop there:

- **COACH.** Help your people succeed through encouragement and suggestions, and by regularly reviewing the action plan. Encourage ongoing development and growth.
- **COMMUNICATE.** Supply your team members with current AARP Tax-Aide information as you receive it, and AARP general information as applicable to AARP Tax-Aide.
- **EVALUATE.** Schedule regular reviews covering both successes and problem areas. Feedback flows two ways—listen for how you can be more effective.
3C. Know What Motivates Your Team

Motivation is an individual experience, and we are all motivated by different things. These different motivations affect how individuals and teams are best supervised. People motivate themselves; the best you can do is to tailor motivators to fit their individual needs. Generally accepted research has identified three types of motivational needs:

1. *achievement* -- a desire to establish and meet goals and succeed,
2. *power* -- a desire to have a say in what happens and to influence others, and
3. *affiliation* -- a desire to feel part of a group and work in harmony.

An “Achievement” person:
- takes calculated risk
- prefers clearly defined tasks and outcomes
- thinks about finding ways to attain goals
- will learn a new skill to improve performance

A “Power” person:
- takes high risk
- prefers formal policies and procedures
- thinks about finding ways to influence others
- will learn a new skill to train others

An “Affiliation” person:
- avoids risk
- prefers a loose, informal structure
- thinks about consoling or helping others
- will learn a new skill to be part of a team

People experience all these motivations at various times, but one orientation will be strongest most of the time for most people. Use your knowledge of what motivates volunteers to best support their efforts.

For high “achievement” volunteers,

<table>
<thead>
<tr>
<th>Create a motivational environment by:</th>
<th>Provide motivational rewards by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>⇒ Involving the volunteer in setting realistic goals.</td>
<td>⇒ Rewarding performance, not personal characteristics.</td>
</tr>
<tr>
<td>⇒ Being specific about what, when, why, &amp; where.</td>
<td>⇒ Focusing on achievement and unique contribution.</td>
</tr>
<tr>
<td>⇒ Providing checkpoints; giving and requesting feedback.</td>
<td>⇒ Using statistics to measure success.</td>
</tr>
</tbody>
</table>
For high “power” volunteers,

<table>
<thead>
<tr>
<th>Create a motivational environment by:</th>
<th>Provide motivational rewards by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>⇒ Involving the volunteer in decisions, risk-taking, design of procedures and processes.</td>
<td>⇒ Making rewards formal, structured public; involving other authority figures.</td>
</tr>
<tr>
<td>⇒ Avoid indecision and informality.</td>
<td>⇒ Focusing on leadership, influence, contributions to structure, procedures, and policies.</td>
</tr>
<tr>
<td>⇒ Giving information, responsibility, and authority to do the job.</td>
<td></td>
</tr>
</tbody>
</table>

For high “affiliation” volunteers,

<table>
<thead>
<tr>
<th>Create a motivational environment by:</th>
<th>Provide motivational rewards by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>⇒ Make the volunteer part of a team.</td>
<td>⇒ Make reward informal, warm, and friendly.</td>
</tr>
<tr>
<td>⇒ Be informal, supportive.</td>
<td>⇒ Focus on team efforts; reward in front of peers.</td>
</tr>
<tr>
<td>⇒ Acknowledge special contributions and loyalty.</td>
<td>⇒ Give lots of support and encouragement.</td>
</tr>
<tr>
<td>⇒ Establish a personal relationship.</td>
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</table>

Intangible rewards (a cheery greeting, remembering a special event, remembering names) are typically informal, while tangible rewards (a certificate, plaque, coffee mug, promotion) are often more formal. Both have their place in your arsenal of motivation.

Sometimes a “motivation problem” is really something else. Find out what’s going on before assuming motivation is the cause. Possibilities? Poor scheduling, mismatched expectations, lack of training, personal or health problems are examples of other barriers to achieving higher performance levels. Talk with the volunteer and express support in trying to find a real solution.
3D. GOAL SETTING

Thousands of AARP Tax-Aide volunteers turn goals into realities. State Coordinators set those goals, and plan for their translation into effective action. Goal setting is a circular step-by-step process that enables a group to decide how to achieve a desired outcome.

A Simplified Goalsetting Process Example
AARP Tax-Aide

Goal:
Expand The Program To Help More Taxpayers Meet Their Tax Filing Obligations

Evaluation:
• Count volunteer increases
• Measure service increases
• Determine new sponsors
• Assess presence in new markets

Needs:
• Recruit Volunteers
• Create Sites
• Publicize Program
• Enlist Sponsors To Help With All Three

Action Plan:
• SC enlists recruitment help from AARP
• ADS identifies vacancies in Gotham & River City & projects Hooterville needs
• CMS creates publicity campaign for Metropolis & encourages local sponsor enlistment
• TCS establishes e-filing site in Metropolis
• TBS schedules special counselor training for Hooterville

Priorities:
• Increase capacity in Gotham & River City
• Build demand in Metropolis
• Create presence in Hooterville

Objectives:
• Recruit additional volunteers in Gotham & River City
• Generate more publicity for Metropolis
• Establish staffed sites in Hooterville
• Initiate e-filing capability in a major site

GOAL: Broad, challenging (but realistic), positive, and includes an action verb.

NEEDS ASSESSMENT: What are the specific needs related to your goal?

PRIORITIES: Focus on your top priorities and let those successes build future planning.

OBJECTIVES: Specific, measurable, and challenging (but realistic).

ACTION PLAN: The who, what, where, when, why, and how of activities.

EVALUATION: How did it all work, and what should you do next?

Although limitless in their possibilities, examples of additional goals might include improving the training and support systems for your volunteers, increasing the accuracy rate of counseling, increasing an e-filing presence, or obtaining donated equipment.
4. RECRUITMENT

Leadership and delegation are essential responsibilities of State Coordinators, but these concepts presume having people in position to be led. AARP Tax-Aide’s success hinges on the programs, and especially the State Coordinator’s, ability to attract talented people with different backgrounds and experiences. Not only do these people meet the program’s immediate needs, but they also form a pool of future leadership talent.

4A. DIRECT RECRUITING

<table>
<thead>
<tr>
<th>Developing Outreach Message</th>
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<tbody>
<tr>
<td>To “sell” the position to the type of person you’re looking for, develop a recruitment message that:</td>
</tr>
<tr>
<td>• is based on the position description</td>
</tr>
<tr>
<td>• clearly identifies potential benefits to both the potential volunteer and community</td>
</tr>
<tr>
<td>• is clear, concise, and positive</td>
</tr>
<tr>
<td>• avoids abbreviations that readers won’t know</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Where To Prospect?</th>
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<tbody>
<tr>
<td>Most positions that report to the State Coordinator are filled by volunteers from within AARP Tax-Aide (existing local/district coordinators, instructors, counselors). But consider external sources. Volunteers in many leadership positions do not necessary have to have been a certified tax Counselor. Try AARP’s prospective volunteer database or your AARP state office; RSVP or other volunteer clearingsouses; computer clubs; Internet volunteer pages such as <a href="http://www.VolunteerMatch.com">www.VolunteerMatch.com</a>; and civic groups, churches and other places of leadership. Your state’s AARP may have need for new volunteers and may already be involved with a recruitment campaign that you can join or the state office may be interested in a joint recruitment effort (they may even be able to pay for related publicity or mailings).</td>
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<table>
<thead>
<tr>
<th>Isolating Talented Prospects</th>
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<tbody>
<tr>
<td>Any number of people may be interested in your vacancy, but you must identify those that you think can best handle the job. Be fair in your notification of vacancies, good candidates are not always the obvious ones. Talk in general terms about the responsibilities, and listen to how people respond. If you let people talk, they will provide you with information about their experiences. Carefully monitor your internal reactions to this discussion and form your opinions accordingly.</td>
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<tr>
<th>Prepare Interview Tactics</th>
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<tbody>
<tr>
<td>You are ready to use interviews to select from your pool of candidates. (In the real world of AARP Tax-Aide, you will frequently only have one candidate, so be prepared to interview directly from the previous step.) Develop a list of questions in advance, to help you learn the skills, qualifications, interests, and motivations of the applicants. You should generally ask the same questions of all applicants for the same position. Make the questions open-ended to encourage applicants to discuss their experiences.</td>
</tr>
</tbody>
</table>
### Interview Checklist

Use this checklist when preparing for an interview:
- ✓ Review the position description.
- ✓ Decide what qualifications are essential.
- ✓ Pinpoint your expectations of the person to fill the position.
- ✓ Review the resumes and applications of the candidates.
- ✓ Prepare interview questions.
- ✓ Arrange an interview site where you won’t have interruptions.
- ✓ Phone the candidate to schedule the interview and verify interest.

### Review Position Description

The position description lists specific requirements and expectations, and creates a basis for discussion with potential candidates. Key elements to review are:
- • Purpose of the position
- • Specific duties and responsibilities
- • Available resources
- • Time commitment
- • Duration of position
- • Evaluation procedure

### Explain Benefits of Position

Be specific about what your candidate can gain from the position. Benefits might include:
- • Satisfaction from helping people (AARP Tax-Aide’s mission)
- • New skills or experience (AARP Tax-Aide’s operations)
- • New relationships (AARP Tax-Aide’s networks)

Keep in mind that your candidate’s motivation for volunteering may well be different from your own.

### Interview Tips

- • Make the interview a two-way street. You assess the applicant’s suitability for the position, while the volunteer gathers information about AARP Tax-Aide. You must ultimately choose each other.
- • Help the applicant feel good about AARP Tax-Aide & his/her potential role in it.
- • Be courteous. Respect the applicant’s time, and stay on track.
- • Take notes, after telling the applicant that you will do so.
- • Ask follow-up questions for more information as needed.
- • Avoid asking questions or making judgments about legally protected characteristics (see following list).
- • Summarize at the end. Tell the candidate what will happen next. If a match is made, explain the next steps in the process.
Legally Protected Characteristics

- race
- color
- gender
- national origin
- religion
- mental handicap
- physical handicap
- veteran status
- sexual preference
- marital status
- on-the-job injury
- previous reporting of a safety hazard
- arrest (not conviction) record.

Note: Although all of these characteristics may not be legally protected in all parts of the country, for the sake of inclusion and increasing diversity, volunteers are strongly encouraged to treat all the above listed characteristics as legally protected.

Follow Through

Many enthusiastic, committed candidates have been lost due to poor follow-through!
- If the candidate says “yes,” give a verbal welcome, do the paperwork, and get the person involved as soon as possible.
- If the candidate says “no,” determine if it is a solid “no.” Could you offer a more appealing option? Would the candidate be interested in the future?
- If the volunteer says “maybe,” supply any additional information the candidate requests; looking for some way to make the position more appealing. Set a deadline for a final response. Would the applicant be better suited for another position?
- If you say “no,” explain that the closest possible match was necessary. Offer other position descriptions more closely matching the individual’s needs, interests, background. There are other positions within AARP Tax-Aide, as well as within the larger AARP. Maintain the person’s self-respect.
4B. INDIRECT RECRUITMENT RESPONSIBILITIES

Although the State Coordinator is not directly responsible for recruiting Local Coordinators, Instructors, or Counselors, he or she has an active interest in the process.

Counselors

Counselors are the mainstay of AARP Tax-Aide, and attrition alone requires constant replenishment of the cadre. Program growth requires even more Counselors, so this level of recruitment is constant and typically broad-based. Widespread public outreach is necessary to attract the numbers of counselors needed by AARP Tax-Aide.

Counselor Recruitment

Public outreach for Counselor recruitment comes in a variety of ways, listed below in general order of effectiveness:

- AARP Tax-Aide Volunteers
- Local print publicity
- Word-of-mouth
- National print publicity (AARP The Magazine)
- AARP staff member
- Local newsletter
- Internet web page solicitation
- External Partners

Instructors

The Instructor corps is needed to keep Counselor expertise current, and is a much smaller cadre of volunteers than Counselors. Instructors rarely come from outside the program, given the tax counseling expertise required to train Counselors. Recruitment is nearly always one-on-one.

Local Coordinators

Local Coordinators handle all of the management and administrative processes necessary at the local level to make the program work. While Counselors provide the tax expertise, Local Coordinators handle recruitment, site development, and procedures that make counseling possible. Most Local Coordinators are recruited from the ranks of Counselors. It is a natural but not required path to becoming a Local Coordinator.

“Grade Creep”

State Coordinators should be mindful of the natural tendency for AARP Tax-Aide (and any other similarly sized operation) to become top heavy in its organizational structure. It starts when Counselors are assigned the honorary title of Local Coordinator as recognition for long service, or because the program’s Counselor reimbursement policies restrict developmental work that volunteers in outlying areas would otherwise be inclined to do.
Pressure On State Coordinator

The need for more District Coordinators is the ultimate outcome of an increase in Local Coordinators. Adding more District Coordinators causes an inordinate number of people reporting to the State Coordinator, who will start looking for ways to alleviate the pressure of too many direct reports.

Senior District Coordinator

One answer to the problem of too many direct reports is the implementation of the Senior District Coordinator position, to spread out the reporting structure of the District Coordinators. But adding another coordinator level increases the communication logistics within the state organization. Messages, procedures, and policies from the State Coordinator to Counselors now travel through three layers of coordinators instead of two. The Senior District Coordinator position should not be enacted lightly.

Policy For Senior District Coordinator Enactment

Because of the inherent communications issues described above, Senior District Coordinators can only be appointed with Regional Coordinator and National Office approval. More importantly, the State Coordinator must analyze his or her state structure prior to such an appointment, assuring that the numbers of Local and District Coordinators are truly appropriate for the state’s needs. The Regional Coordinator will seek that assurance from the State Coordinator, and may wish to participate in the analysis.
4C. Recruitment Help Within AARP

The larger AARP has great potential as a volunteer recruitment source, and the AARP Tax-Aide State Coordinator is uniquely positioned to take advantage of this resource.

AARP has a volunteer Recruiter Specialist in many states. The recruiter specialist is charged to assist the recruitment needs of all AARP activities, including AARP Tax-Aide. State Coordinators should ask these specialists for help in finding volunteers at all levels within the program.

As other AARP volunteer operations recruit for positions, AARP Tax-Aide’s needs can be added to the equation. If a surplus of candidates occurs for any given position, those potential volunteers can be made aware of other opportunities.

AARP maintains its 35 million membership listing in Insights. Working with your AARP State Office and staff at Headquarters, you may be able to do a recruitment mailing to current AARP members.

Recruitment pitches for AARP Tax-Aide are run at least annually in AARP, The Magazine, and Bulletin, and are arranged by AARP Tax-Aide’s National Office. However, inkjet messages (short boxed messages in the back pages) within AARP’s, The Magazine and Connections are arranged at the state level. Ask your state’s communications lead about running a recruitment inkjet message.

Each state publishes its issue of Connections for AARP’s volunteer leaders within the state. Articles about AARP Tax-Aide and its recruitment needs are generated by contact with AARP’s state Volunteer Communications Coordinators and staff communications representatives, ideally by AARP Tax-Aide’s Communications Specialist.
### 5. COMMUNICATION RESPONSIBILITIES

#### 5A. COMMUNICATION RELATIONSHIPS

State Coordinators maintain direct communication relationships with a tremendous number and variety of people. Good communication is essential to effective statewide AARP Tax-Aide operations.

<table>
<thead>
<tr>
<th>State Management Team</th>
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<tbody>
<tr>
<td>State Coordinators effectively lead the State Management Team (SMT) with constant communication to and among its members. SCs receive a great deal of information that should be passed to all team members. Much more important is the on-going communication about progress and obstacles to the operational plans developed by the SMT. The camaraderie that results from shared responsibilities will pay positive dividends across every operation of the program.</td>
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<table>
<thead>
<tr>
<th>District Coordinators</th>
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<tbody>
<tr>
<td>District Coordinators are the lead implementers of state plans. They must integrate new initiatives into existing operations, which of themselves carry major communication responsibilities. They are also the primary source for feedback on progress, problems, and program needs. Again, camaraderie within this team pays countless dividends.</td>
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<tr>
<th>Facilitating Communication By Others</th>
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<tbody>
<tr>
<td>State Coordinators need their SMT colleagues and District Coordinators to communicate with each other and to the larger volunteer cadre. It is easy to encourage such communication; it is effective to demonstrate it yourself. The frequency and style of your communication is likely to be the model replicated by those with whom you communicate. AARP Tax-Aide’s greatest internal need is for more communication; and, within any state it starts at the top.</td>
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<thead>
<tr>
<th>Regional Coordinators</th>
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<tbody>
<tr>
<td>State Coordinators report to Regional Coordinators, and must keep them informed of the state’s operations as they learn of overall program initiatives. The closeness of the Regional/State coordinator relationship will dictate the style of communication. A healthy relationship includes frequent, informal conversation.</td>
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<tr>
<th>AARP Tax-Aide National Office</th>
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<tbody>
<tr>
<td>Communication with the National Office is frequently in pursuit of a problem that needs resolution (e.g., reimbursement issue, roster or site data correction). State Coordinators receive ad hoc communication from the National Office, by mail or e-mail. Policy or procedural discussions are infrequent, as these are most appropriately held with Regional Coordinators.</td>
</tr>
</tbody>
</table>
IRS Territory Offices provide a great deal of support to state AARP Tax-Aide operations:

- training materials
- trainers for Instructor Workshops (They will no longer provide training for counselor classes)
- program publicity
- customer referrals
- e-filing training and support
- tax preparation and transmission (e-filing) software
- EFIN number acquisition (a site identifier required for e-filing)

Although other members of the SMT typically work with this support, the State Coordinator provides overall facilitation by good communication with the IRS office.

AARP State Coordinators have access to a host of AARP volunteers and staff, all of whom are potential resources for AARP Tax-Aide operations. Recognizing the realities of human nature, the State Coordinator’s relationship with the larger AARP is a great influence on the support that AARP Tax-Aide ultimately receives.

Effective communication requires universal skills:

- active listening (not just waiting for your next chance to pontificate)
- participation in the discussion (demonstrating your interest in the issue)
- openness of thought (appreciation of different perspectives)
- clarity of expression (a much appreciated art)
- paraphrasing (using your words to confirm your colleague’s thought)

5B. COMMUNICATION OPTIONS

The art of communication is both enhanced and complicated by the many options available to us. State Coordinators must continually balance the efficiency of a particular option against its effectiveness under the circumstances. This too is an art.

Person to person is the most direct communication possible. It is useful for hashing out details, solidifying relationships, and resolving crises. A key value of this option is the inclusion of non-verbal communication. In-person meetings have high effectiveness and high cost (low efficiency) unless the parties are proximate. A State Coordinator is unlikely to travel any real distance to recruit a new Counselor, but recruiting a District Coordinator is a different story.
| **In-Person Group Meeting** | Same benefits as above, excepting the closeness and confidentiality of a one-to-one discussion. Group meetings are also useful for reinforcing team camaraderie, and are needed when the volume of details precludes other options. When distances traveled to the meeting location are minimal and other miscellaneous cost reduced, these types of meetings can be cost effective. Conversely, when distances traveled are large, the cost of the meeting can be quite prohibitive due high mileage, meals and overnight hotel stay reimbursement. A State Coordinator typically calls a meeting to plan and kick off the season. |
|**Telephone** | A very efficient communication tool and effective for gathering and disseminating limited amounts of information and for doing so quickly if contact is made. Effectiveness drops as the volume of detail rises. State Coordinators ideally make frequent, informal calls to the people that report directly to him/her. |
|**Conference Calls** | Conference calls represent relatively new technology, and many AARP Tax-Aide State Coordinators do not employ them as a communication technique. However, the program is slowly gaining experience with conference calls, and is finding them useful for discussing issues, polling opinion, brainstorming, and sharing experiences. Conference calls are not useful for detailed analyses of complicated situations; however, they serve as a low cost alternative to supplementing in-person group meetings where distances traveled are larger and cost become prohibited especially if overnight stays are required. |
|**E-Mail** | E-mail has all the efficiency of the telephone, with the added benefit of recording and storing the offered thoughts. E-mail communication also avoids much of the extraneous dialogue that makes up voice communication. E-mail distribution lists of team members are useful for updates, problem identification, and limited decision making. Involved discussions among multiple colleagues become confusing. |
|**Paper** | Snail mail still has its place in today’s communication strategies, as it is very useful for one-way information dissemination. |
5C. PREPARING PRESENTATIONS

Select the information: What should you include and in what order?

<table>
<thead>
<tr>
<th>Clarify Expectations</th>
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<tbody>
<tr>
<td>What are your goals for the presentation? (What do you want people to know or do?)</td>
</tr>
<tr>
<td>How much time will you have?</td>
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<tr>
<td>Will there be interaction, along with a question and answer session after?</td>
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<tr>
<th>List &amp; Prioritize Your Objectives.</th>
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<tbody>
<tr>
<td>Do you want:</td>
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<tr>
<td>• To persuade the audience to do something?</td>
</tr>
<tr>
<td>• To inform your listeners?</td>
</tr>
<tr>
<td>• To solicit information or suggestions from others?</td>
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</table>

Prioritize your objectives so that you can deliver the critical information in the allotted time. Be prepared to concentrate on the highest priorities, touching on lower-priority objectives briefly or even skipping them completely.

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<thead>
<tr>
<th>Brainstorm Available Information</th>
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<tr>
<td>Don’t critique or edit free flowing thoughts – they will quickly stop flowing. Stretch yourself beyond your first few ideas or what you “always” say. Save the reasons why something won’t work until it has been fully explored, and remember that the devil needs no advocates.</td>
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<tr>
<th>Select Best Information</th>
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<tbody>
<tr>
<td>Select the best information to support your objectives. If you use supporting materials (handouts, slides, etc.), be sure they enhance—not overwhelm—your presentation.</td>
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Know your audience: What is important to them?

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<thead>
<tr>
<th>Assess Audience</th>
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<tbody>
<tr>
<td>• Who are they? (There’s a difference between SMT members and District Coordinators, and between new vs. long-established volunteers.)</td>
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<tr>
<td>• What different perspectives will they have on your subject? (Specialists are very focused on their specialty, while coordinators are more concerned about the impact on overall operations.)</td>
</tr>
<tr>
<td>• What do they already know, and what questions will they ask? (Anticipate their questions and prepare simple answers.)</td>
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<table>
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<tr>
<th>Identify Benefits</th>
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<tr>
<td>How will things be better for them if they follow your lead? Your success in getting your audience to really listen to your presentation, let alone follow your lead, increases significantly if they hear how they will benefit. If there is no benefit for the audience, at least, briefly provide a logical rationale for your message or suggestion.</td>
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</table>
**Involve Your Audience**

Involving your audience is a key, but generally overlooked, component of effective presentations. You can plan to ask some questions to generate discussion, design a verbal or written quiz to test their knowledge (e.g., the administrative quiz near the back of the *Counselor Digest*), or give them an activity to work on briefly in pairs or small groups.

**Make Personal Contact**

Contact before the presentation establishes a relationship for the presentation, especially for people you haven’t met yet. Informal talking with a few audience members will help you focus on their concerns and be more at ease.

---

**Prepare Yourself: What can you do to get ready?**

**Identify Your Strengths**

Know what you do well and build on it -- know your weaknesses and don’t let them trip you up! Are you a good storyteller? Tell a story. Do you always forget the punch line? Leave the jokes out. If you are a highly logical person, build a logical presentation. If you are visionary, paint images with your presentation.

**Plan Your Opener & Closer**

People will remember your opening and closing the most. Prepare a way to end a question and answer session. Have a strong ending statement to reinforce your main objective.

**Make Notes**

Make practical notes that include cues for you, like when to pause, or when to distribute a handout.

**Rehearse**

Rehearse aloud. Talking through your presentation in your head is not sufficient. You will hear your presentation’s strengths and weaknesses better if you rehearse aloud. Time your presentation and edit it to fit.

**Evaluate Your Success**

How well did you do? Take time to evaluate yourself soon after the presentation. Identify the best or strongest parts of your presentation, as well as weaker points that you would like to improve in the future. Ask for feedback from the participants.
6. MANAGEMENT RESPONSIBILITIES

6A. ASSURING TRAINING

State Coordinators (SCs) necessarily ask a lot of the volunteer cadres in their states. Therefore, they must assure that volunteers receive the training and guidance available to them.

**Administration Specialist (ADS)**

- New ADSs are invited to an annual training event in August or early September, convened by the National Leadership Team (NLT) and conducted by experienced ADSs, other volunteers and/or National office staff.
- All ADSs should annually receive an ADS Management Guide in September.
- SCs should encourage all ADSs to establish relationships with ADSs in other states, as networking is as valuable as any formal training that can be devised.
- Volunteers Technicians and Luisa Torres Chaoui are available at the National office as additional resources for ADSs. (see back page for contact information)

**Partnership and Communications Specialist (PCS)**

- New PCSs are invited to an annual training event in August or early September, convened by the NLT and conducted by staff from the National office and volunteers.
- All PCSs (as well as Communications Coordinators) should annually receive a Communications Management Guide in September.
- SCs should encourage all PCSs to establish relationships with counterpart PCSs in other states, as well as with the AARP communication volunteers and staff in their states.
- Fran Brenneman and Tina Purser Langley are available at the National office as additional staff resources to the PCSs. (see back page for contact information)

**Technology Specialist (TCS)**

- New TCSs are invited to an annual training event in August or early September, convened by the National Technology Committee (which reports to the NLT) and conducted by committee members.
- All TCSs, as well as Technology Coordinators, should annually receive a Technology Management Guide in September, and should be encouraged to order Pub 3189 from the IRS.
- SCs should encourage all TCSs to establish relationships with TCSs in other states, as well as with local IRS e-filing staff.
- Electronic communication from the National Technology Committee via Technology Bulletin as well as Cybertax produces the latest breaking news on e-filing.
- An email account has been established to assist TCSs with questions during the tax season. www.taxaidetech@aarp.org.

**Training Specialist (TRS)**

- New TRSs are invited to an annual training event in late August or early September, convened and conducted by the National Training Committee (which reports to the NLT).
- All TRSs should annually receive a TRS Management Guide in September.
- SCs should encourage all TRSs to establish relationships with TRSs in other states, as well as with local IRS staff.
Prospective Volunteer Coordinator (PVC)

- PVCs are trained directly by the State Coordinator.
- SCs should provide the PVC with a copy of the 888 number instructions (available from the National office at 800-424-2277 ext. 6027).
- SCs should encourage their PVCs to establish relationships with PVCs in other states, as well as with the AARP state recruitment coordinator.

District Coordinators (DC)

- SCs (ideally, the full SMT) traditionally convene an annual state planning meeting with his/her District Coordinators in October, November or early December. This time together presents a training opportunity as well, especially for SMT members to train District Coordinators in their specialty functions.
- All DCs should receive a Coordinators Handbook in October.
- SCs should encourage his/her DCs to communicate with on a regular basis.

Local Coordinators (LC)

- SCs should expect their DCs to train their LCs as needed.
- All Local (and District and State) Coordinators should receive an LC Digest in October.

Instructors

- SC should expect their TRSs to coordinate and conduct a workshop for Instructors in the late fall, including receipt by the Instructors of the IRS Pub 1155.
- All Instructors should receive an Instructor Digest in October.
- New Instructors may need more comprehensive training by the TRS.
- Returning Instructors may need a brief refresher and updates on new tax laws.

Counselors

- SCs should expect their Instructors to coordinate and conduct Counselor tax training, typically in December (after the Instructor Workshop) and January.
- SCs should expect all coordinators who supervise Counselors to assure that all Counselors pass the IRS Certification test.
- SCs should expect all coordinators who supervise Counselors to assure that needed administrative training is provided.
- All Counselors should receive a Counselor Digest from either their supervising coordinator or instructor.

Communications Coordinators (CC)

- CCs should receive training and guidance from PCS.
- CCs should receive the Communications Management Guide in September.

Technology Coordinators (TC)

- TCs should receive training and guidance from the TCS.
- TCs should receive the Technology Management Guide in September.

6B. ASSURING UNDERSTANDING
Training, handbooks, and policies are necessary but by themselves insufficient components of effective program management. People need to feel the leadership of a real person – the State Coordinator – rather than a faceless National Leadership Team or National Office. The State Coordinator interprets, implements, and uses real words to explain AARP Tax-Aide’s goals and needs. For example:

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**Interpreting Policy**

All policies have intent and sometimes some colorful history. A discussion with your Regional Coordinator about key AARP Tax-Aide policies could uncover this information and help your perspective in explaining things to state volunteers.

---

**Proactive Outreach**

Quantitatively-oriented people are usually not known for their communicative zeal, but all AARP Tax-Aide volunteers are in a position to help with the program’s three basic needs:

1) program publicity
2) volunteer recruitment
3) finding community partners

Most AARP Tax-Aide volunteers limit their involvement to counseling, but even in that capacity they can encourage word-of-mouth promotion with their customers.

---

**Community Partners**

AARP Tax-Aide looks for the following from community partners:

- equipment
- software
- supplies
- funding
- publicity of our service
- physical site locations
- volunteer recruitment
- volunteer recognition

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**Implementing Policies**

Many AARP Tax-Aide policies rely on State Coordinator discretion in their implementation, so as to be most sensibly applied.

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**Influencing Policies**

State Coordinator perspective is required for sound policy development. State Coordinators should work with their Regional Coordinators to influence program direction and procedures.
Leading By Example

The cost of administering AARP Tax-Aide is ultimately determined not by policy so much as the individual decisions of thousands of volunteers. Those volunteers will look to their leaders for demonstration of fiscal responsibility in implementing program operations. This is especially true at the local level, but the State Coordinator’s example will strongly influence local behavior.

Two-Way Streets

AARP Tax-Aide needs feedback from its volunteers to set future direction and to correct past mistakes. Such information flow back to the State Coordinator, and subsequently to the Regional Coordinator, is vital for long-term program viability. There are always better ways to do business, and the State Coordinator can see them most clearly.

Forms, Forms, Forms

AARP Tax-Aide operates primarily in a paper realm, with information transmitted by forms and reports. Forms and reports are used to:

- claim expense reimbursement (expense statement)
- verify volunteers in the program (personnel forms in to the National Office, rosters back out to volunteers)
- verify program sites (site forms in, site rosters back out)
- capture service (Summary Activity Reports in, activity & supervisors summary reports back out)
- obtain materials (order forms: regular and national office)
- assess operations (program assessment form in, Happenings summaries back out)

This paperwork is a major irritant to volunteer leaders – possibly including the reader of this guide – but the need for it is clear. The National Office is seeking automation of some of the above, but moving at glacial speed.

Understanding Paperwork

Few people enjoy dealing with forms, reports, and related paperwork. However, the task is a lot more palatable if people understand why something is needed. State Coordinators should help their volunteers remember the purpose behind the paper.
7. PLANNING AND CONDUCTING MEETINGS

7A. MEETING CONSIDERATIONS

Meetings provide the opportunity for face-to-face communication, which is the most effective possible interaction. It is also the most expensive form of interaction, so participant time together must be well spent.

Identify Meeting Purpose

The first order of business is to clearly identify the purpose for the meeting. What work will take place in the meeting and to what outcomes? What are the specific ideas and action steps you want meeting participants to take away from the meeting?

Is A Meeting Necessary?

Having determined the purpose, you must now decide if a meeting is needed at all. The communication need drives such a decision. The State Coordinator must decide if his/her communication needs can alternatively be met by a scheduled conference call, individual calls, e-mail, or mailed correspondence. These are all relatively inexpensive options, and desirable if sufficient to meet the need.

Develop The Agenda

If you’ve determined that a meeting is necessary, an agenda is equally necessary. Driven by tangible outcomes, an agenda should identify the following:

- purpose, including those tangible outcomes
- specific agenda topics
- person(s) responsible for each topic
- meeting date, location, and start/finish times

Mail or email the agenda in advance to the participants and take extra copies to the meeting.

Involve Participants

It pays dividends to involve participants in planning and conducting of meetings. As co-planners, participants lend varying perspectives and develop a stake in the meeting outcome(s). Active involvement within the meeting is stimulating, also lends varying perspectives, and shares the responsibility. If a State Coordinator simply monopolizes the presentation at a meeting, any outcomes that are realized could likely have been achieved via a conference call or letter.
7B. MEETING LOGISTICS

There are logistical as well as dollar costs to a meeting. These are the responsibility of the person calling the meeting.

<table>
<thead>
<tr>
<th>Set Date &amp; Time</th>
<th>Select a date and time convenient for the participants, taking travel times into consideration. Also consider availability of guest speakers (e.g., IRS or state tax office staff), if appropriate.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose Location</td>
<td>Select a meeting facility is convenient to as many attendees as possible. Look for parking, and consider whether it needs to be near public transportation. Is it accessible for persons with disabilities? Is the lighting and seating adequate? Are there adequate electrical outlets?</td>
</tr>
<tr>
<td>Invite Participants</td>
<td>Send a meeting announcement to all the participants well in advance, including an agenda (see prior topic—Meeting Considerations—for content). Also include a contact name and phone number for more information. Inform them of any advance work that needs to be done, such as reading a report or verifying site/volunteer information.</td>
</tr>
<tr>
<td>Gather Supplies</td>
<td>Do you need pens, notepads, flipcharts and markers, masking tape, projector? Name tags are always helpful. If e-filing or other software will be demonstrated, assure that a computer is onsite. AARP State Offices or the IRS may have LCD projectors that can be loaned at no cost.</td>
</tr>
<tr>
<td>Direct Billing To National Office</td>
<td>Meeting facility costs (sleeping rooms, meeting rooms, group meals) can be direct billed to the National Office, to reduce out-of-pocket expenses for AARP Tax-Aide volunteers. However, prescribed procedures are required to arrange such billing. The procedures are described in the Coordinators Handbook -- each meeting leader will decide if direct billing is desirable.</td>
</tr>
</tbody>
</table>
## SET THE TONE

Start on time. Review the purpose and agenda for the meeting. Oversee introductions, so that the participants, including guest speakers or newcomers, know each other. You can be serious in your intent without being too serious in your demeanor.

## USE THE AGENDA

Use your best judgment to decide when it’s best to stick to the agenda or modify it. Meet participant needs while ensuring that the meeting’s purpose is accomplished.

## MANAGE BEHAVIORS

Stay in charge. Participants have diverse personalities and communication styles. Be sure that everyone has an opportunity to contribute their thoughts, opinions, and suggestions.

## WRAP UP

Summarize the key decisions and review the next steps. Solicit feedback about the meeting ("What was useful about the meeting today?" or "What suggestions do you have for making our next meeting more effective?") Such feedback is a valuable tool for improving your next meeting.

## FOLLOW UP

Follow up with participants by preparing a summary of key points and distributing it promptly.
8. AARP IN THE STATES

In the past, AARP Tax-Aide State Coordinators served on AARP’s Leadership Council for their respective state. Although these councils have been replaced as a planning unit for the state, there are still effective ways to participate and partner with the broader AARP in your state. The goal of effective partnership is to benefit AARP Tax-Aide and the larger AARP.

<table>
<thead>
<tr>
<th>AARP’s Strengths</th>
<th>AARP can help publicize AARP Tax-Aide, recruit volunteers for the program, and provide entree to potential sponsoring organizations. However, this is rarely automatic – the State Coordinator must be explicitly clear about the program’s needs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>AARP Tax-Aide’s Strengths</td>
<td>AARP Tax-Aide is AARP’s largest program, with unparalleled community presence. This presence can help the larger AARP build additional program activities, and AARP Tax-Aide’s public outreach is ideally suited for compatible programming in the financial arena (e.g., Money Management Programs, Public Benefits Check-Up).</td>
</tr>
<tr>
<td>Other State Level Volunteers</td>
<td>The State President is the lead volunteer in the state. He/she also represents AARP to media and groups and can publicize the program.</td>
</tr>
<tr>
<td>Role of State Director</td>
<td>The AARP State Director shapes and guides state plans and priorities in coordination with your State President and State Executive Council. It is essential that you, as a State Coordinator, get to know your AARP State Director—informing him or her of your program needs and looking for ways to achieve mutual goals and expectations.</td>
</tr>
<tr>
<td>Role of the Associate State Director</td>
<td>The Associate State Director (ASD) is the main point of contact for you at the state level. The ASD is responsible for implementing the state plans and priorities for the year. It is important that you as State Coordinator establish a good working relationship with the ASD as soon as possible to discuss your overall AARP Tax-Aide plans and service goals for this tax season.</td>
</tr>
<tr>
<td>Quid Pro Quo</td>
<td>An AARP Tax-Aide State Coordinator should approach other state AARP volunteers and staff with a quid pro quo attitude: look for help with your needs and expect to help others with their needs. Many states typically form action teams to carry out their decisions. Participation on action teams will provide a means to meet other AARP volunteers and staff and see possibilities for collaboration.</td>
</tr>
<tr>
<td>State Planning Process</td>
<td>Executive Council decisions ultimately appear within the “state plan,” a documentation of AARP’s priorities. AARP Tax-Aide State Coordinators should participate in the development of state plans and, thus, have the opportunity to include the program’s needs (publicity, recruitment, sponsors).</td>
</tr>
</tbody>
</table>
Logistics & Expenses

When asked to serve on state action teams or other broader AARP activities, AARP Tax-Aide State Coordinator expenses are reimbursed by the larger AARP, not from AARP Tax-Aide funds. In addition to the philosophy of AARP covering these expenses, AARP Tax-Aide is contractually prohibited from spending IRS grant dollars on non-Tax-Aide activities.

AARP's Advocacy Efforts

Remind all AARP Tax-Aide volunteers that as volunteers in an AARP Foundation federal grant program, AARP Tax-Aide volunteers cannot be solicited for AARP advocacy related activities. Any request or concerns about advocacy efforts and AARP Tax-Aide should be directed to Tina Purser Langley at the National office.
9. APPENDIX

District Coordinator Training

Counselor Training Outline

Activities, Personnel, and Expense Reports

AARP & AARP Foundation Directory
District Coordinator Training

New and prospective District Coordinators (DCs) should receive adequate training to become competent members of the AARP Tax-Aide management team. This training is the responsibility of the State Coordinator and the State Management Team with the assistance and support of retiring and current DCs. It is essential that this training be of the highest quality since the position of DC is a key position in the AARP Tax-Aide Organization.

Reference is directed to the current Coordinator's Handbook regarding the "AARP Tax-Aide Volunteer Position Description: District Coordinator (DC)". The "Responsibilities of Position" items are the basis for training requirements in the DC position. The "District Coordinator Activities Schedule," also in the Coordinator's Handbook, is a valuable reference as is the District Coordinator Training Guide.

Training for DCs should include the following areas:

1. **Orientation to AARP Tax Aide, AARP & the AARP Foundation.**

   The DC must understand his/her responsibilities within the context of the program and the parent organizations. It can generally be assumed that a person selected for the position of DC will have, at least, a basic knowledge of the structure of the program and the parent organizations. It is not expected that AARP Tax-Aide volunteers will be able to answer general AARP or AARP Foundation questions. It is desired for those volunteers to know enough to direct those with general questions to appropriate sources just as it is desired for other AARP staff and volunteers to forward AARP Tax-Aide inquiries to this program. It can be as simple as suggesting contacting the AARP office in his/her state or calling AARP at (800) 424-3410. Training to impart or reinforce knowledge is essential so that the DC may, in turn, train others such as the Local Coordinators and to a certain extent see that the Counselors also have this knowledge.

2. **Goal Setting and Evaluation of Results.**

   The DC needs to set definitive, measurable goals for his/her team, including geographical and diverse population coverage. The success of a DC can be predicted by the effort expended toward setting goals and evaluating results. It is hoped that evaluation of results after the last tax season has been accomplished by the previous DC. Examining these results gives a basis for establishing goals for the coming tax season. Training to accomplish these important tasks can be provided through the experiences of the State Coordinator and other DCs. General training on how to set goals and then how to evaluate the results can be supplemented by AARP training guides and by other training aids.
3. Recruitment of Local Coordinators (LCs), Technology Coordinators (TCs) and Instructors.

One of the most difficult tasks for the DCs is the selection of Local Coordinators (LCs) and Instructors. DCs are often faced with the lack of willingness of volunteers to commit to anything other than being a Counselor. It is essential that competent Counselors are encouraged to assume positions of LC and/or Instructors. Learning to evaluate a Counselor for his/her capability to become either a LC or Instructor takes some training. Knowing the person’s background, such as previous employment, type of position held, areas of responsibility and tax preparation experience, is an aid to evaluation of the individual for either the position of LC or Instructor. Experience in the AARP Tax-Aide program and the individual’s ability to relate favorably with others are also important aspects of this evaluation. In the selection of Instructors, it is important to add the ability to make a stand-up presentation. While previous teaching experience and tax knowledge may be significant factors, they do not imply that the individual will be a good instructor in this program. As with all positions, the assurance of support is a great factor in obtaining the consent of the Counselor to become a LC or an Instructor.

AARP Tax-Aide’s commitment to provide E-filing service to our customers poses an additional challenge to DCs: finding volunteers with the skills/knowledge to support the transition. Technology Specialists cannot personally provide the local support needed by the increasing number of sites transitioning to e-filing. Therefore, the need for more Technology Coordinators to deliver technical support and software training at the local level has risen.

An adjunct task in the area of recruitment is the need to select and keep an informed "back-up" for the DC position. This person should be someone who is capable of taking over the operation of the district, if needed, in an emergency. It is also a training position for a future DC. Many times the best candidate is an existing, competent LC.

After selection of LCs and Instructors, the Personnel Forms to record these changes in status must be submitted to the Administrative Specialist for subsequent transmittal to the National Office.

4. Training.

The next most important area where the prospective or new DC needs assistance is in the area of training in his/her district. Actual training of Instructors is accomplished at the Instructor Workshops by the TRS; but, the responsibility for recruiting, identifying and registering the Instructors from the district is the responsibility of the DC. It may also be the DC’s responsibility to certify to the Training Specialist that the Instructor has satisfactorily passed the IRS test if the test was not given at the Instructor Workshop. Another important obligation of the DC is to assure that an adequate Counselor Training Program is established for all Counselors in the district to be accomplished by the Instructors and in some instances the Local Coordinators to cover administrative processes and quality review. The DC must see that good training methods are being used to train the Counselors that all applicable areas of the Volunteer Assistance Guide are covered, and that testing, grading and certification are accomplished. In the new training and testing world of segmentation, the DC makes the determination for each site in the district as to whether two or three segments of the test must be passed in order to adequately serve customers.
and counsel at the site. The DC is also responsible to assure that each Counselor receives Administrative Training. This may be given by the DC directly or delegated to Local Coordinators or Instructors. The DC must also see that Non-Counselors (computer technicians, receptionists, and telephone appointment personnel) are trained and instructed on their duties.

The DC must understand and explain the intent and implementation of key policies (reimbursement, program scope, donations, insurance and indemnification) as well as the need for feedback on all program phases. The DC must understand and explain the intent and procedures of program forms and reports, enforcing schedules, and providing follow-up as required.

5. Communications and Coordination.

Communications are essential to achieve a smooth running operation. These communications can be in many forms - meeting directly with LCs and Instructors; written communications to LCs, Instructors, the State Coordinator and State Management Team; and, telephone and e-mail. Training the DC for the proper use of communications helps him/her accomplish their task more efficiently and effectively. The DC must be trained in communication skills and this can be supplemented by State and National AARP Programs.

Proper use of reports of all kinds must be understood by the DC—for these reports are essential. Some reports such as site reports and rosters are the responsibility of others but they must be overseen for correctness. The preparation of scannable Summary Activity Reports is critical because the tabulation of these figures assist in obtaining the funding for the AARP Tax Aide program. Proper and timely submission of the Summary Reports is critical. Most DCs wish to keep their own tallies of assistance from the various sites.

Coordination is the key for good management. The ability to organize and coordinate activities is an area of great importance for the DC. Resolution of differences and the ability to receive cooperation in tasks to be accomplished can be achieved by good coordination. Prospective or new DCs must recognize that good coordination skills are one of the fundamentals of the job.

6. Community networking and related public relations opportunities.

Obtaining training and operational sites under the "no-pay" constraints of the program offers a challenge that requires community cooperation. The community must be made aware of the value and need for the AARP Tax-Aide program to those who we serve by providing speakers at civic functions, community centers and service organizations. Use of the various news media outlets provide community awareness of our objective to serve all taxpayers of middle and low income, with special attention to those age 60 or older. The DC should seek out a publicity person from among the counselors to assist in this duty and may appoint a Communications Coordinator to work with the Partnership and Communications Specialist.

Coordination with the IRS Territory Manager and/or Tax Specialist for the IRS district and the counterpart from the state are likewise important in publicizing the program and site operations.
Counselor Training Outline

I. Counselor Prospects

A. One Session, approximately 2 1/2 to 3 hours
B. Overview of Counselor Training, Testing, and Quality Review
C. Share the VAG and Counselor Digest -- give them a look, they may keep if committed
D. Very quick review of the forms.

II. New Counselors (four to five days; if more time is needed to understand the VAG lessons use a mentor or assign with an experienced counselor)

A. Introduce and teach two segments of the VAG, ideally most pertinent to that location. (New counselors can be taught and tested on all three segments should THEY so desire. The program will only require new Counselors to test and pass two segments in order to counsel their first year.)
B. Emphasize areas that have been problems in previous tax years with supplemental exercises.
C. As appropriate, incorporate integrated training for e-filing from IRS Pubs 1155 and 4012 or have a sign up sheet for separate class.
D. Interview techniques, conducting an interview with the right questions.
E. Identify the importance of Quality Review, who is to do it and how it is to be done. (This could be part of the Local Coordinators discussion with the class.)
F. Administrative requirements, recording assistance on the site sign-in sheets, attendance, site management using the Counselor Digest. (This could also be part of the Local Coordinators discussion with the class).
G. Testing over the areas of the VAG taught, with certification accordingly.

III. Experienced Counselors (two to three days depending on changes in the tax forms and code)

A. Review changes for the year, review new and changed forms. Emphasize errors made last year, review those sections of the VAG that need improvement from last year’s performance and use classroom problems to reinforce teachings. This could also include Interview Techniques.
B. As appropriate, incorporate integrated training for e-filing from IRS Pubs 1155 and 4012 or have a sign up sheet for separate class.
C. Administrative requirements – recording assistance on the site sign-in sheets, attendance, and site management using the Counselor Digest. (LC could review this along with Quality Review discussion with the class)
D. Testing in segments of the VAG pertinent for the customers at the counselor’s assigned site. In all cases, at least two segments must be passed; Basic and either Working or Retired.

IV. Electronic Filing

A. Hands-on learning with current Tax-Wise program. Use best source available.
B. Administrative details including how to record on site sign-in sheets and procedures for 8453 forms.
C. Quality Review Techniques, develop techniques necessary for quality product.
D. Testing of skills, utilize given tax problems, along with tax knowledge.
AARP Tax-Aide Activities, Personnel, and Expenses Reports

These reports help AARP Tax-Aide leaders analyze program performance over the past season and are issued to Regional Coordinators and State Coordinators.

<table>
<thead>
<tr>
<th>Activities Report (June)</th>
<th>Personnel Report (May)</th>
<th>Expenses Report (September)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I &amp; II. Specific data on level of service provided</td>
<td>I. Numbers of volunteers</td>
<td>I. Spending by Activity -- 1st-level analysis of spending data</td>
</tr>
<tr>
<td>III. Level of reporting of service provided</td>
<td>II. Numbers and analysis of district structure</td>
<td>II. Spending by Position -- further analysis of spending data</td>
</tr>
<tr>
<td>IV. Numbers of sites and related averages</td>
<td>III. Prior year comparisons</td>
<td>III. Cost averages -- relates costs to amount of service provided</td>
</tr>
<tr>
<td>V. Prior year comparisons</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The detailed spending analysis is provided to show the following:

♦ Expenditures relationship to quantity and quality of service provided.
♦ Fiscal accountability for dollars spent.
♦ Efficiencies in operations to provide more service from available dollars.
♦ Relative levels of effort devoted to different aspects of the program.
♦ Spending by volunteer position to identify how people are carrying out the expectations of their position.

Explanation of some figures on the report:

♦ Negative numbers indicate a reduction this past season, while positive numbers indicate an increase.
♦ Regional Coordinator expenses are included in the Regional Totals Column.
♦ Amounts billed directly to the national office for hotel expenses for Regional/National meetings are reflected in the National Totals Column only.
**AARP & AARP Foundation Directory**

◊ AARP & AARP Foundation: 601 E Street, N.W., Washington, DC 20049

◊ AARP Tax-Aide Mailing Address: P.O. Box 96863, Washington, DC 20090-6863

*NOTE: ZIP Code 20077-7029 is used ONLY on Prepaid Business Reply Envelopes (BREs)*

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(Liaison for Great Lakes Regional Coordinator)
Partnership & Communications Coordinator  Tina Purser Langley  tlangley@aarp.org
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Technology Manager       vacant
Program Specialist          Luisa Chaoui  lchaoui@aarp.org
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AARP Foundation EIN #: 52-0794300 (as a non-profit 501(c)(3) foundation)

**Grants Accounting Department** (for expense follow-up)

Norman Spears    (800) 424-2277 ext 3308 OR (202) 434-3308
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**Insurance & Risk Management Office** (Volunteer Travel Accident Insurance)

3200 E Carson Street
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