

AARP FOUNDATION TAX-AIDE

**Vermont Kick Off Meeting
October 20, 2017**

Agenda

- **AARP Foundation Vision and Mission**
- **Tax-Aide Program Goals**
- **VT Tax-Aide Goals / Activities**
- **Pilot Programs**
- **State Tax Assistance Program – Group Discussion**
- **Housekeeping Bits**

AARP Foundation

Our Vision

**A country free of poverty where no older person
feels vulnerable.**

AARP Foundation®

AARP Foundation

Our Mission

AARP Foundation serves vulnerable people 50+ by creating and advancing effective solutions that help them secure the essentials.

AARP Foundation®

Tax-Aide Program Goals

Three Goals Areas Developed by NLT August

- 1. Recruiting more volunteers**
- 2. Developing more leaders**
- 3. Maintaining quality**

Tax-Aide Program Goals

1. Recruiting more volunteers

- a. Establish a recruitment & retention committee
 - Update: Established – Dan Arnold, Chair
- b. Local marketing focus/word of mouth
 - i. Increase prospects by 25% compared to 2016
 - Update: Improved **5.77%**
 - ii. Improve the conversion rate of prospects by 5% compared to 2016
 - Update: Improved **39.26%**

Tax-Aide Program Goals

1. Recruiting more volunteers

- a. Develop an onboard and retention strategy
 - i. Initial contact within 7 days
 - ii. All 2 years or less volunteers/prospects assigned a mentor
 - **Update: Mentoring pilot established**
 - i. Better vetting of prospects to increase the conversion rate compared to 2016

2017 Tax-Aide Program Goals

2. Developing more leaders

- a. Reduce number of positions leaders hold
 - i. Leaders holding more than 2 leadership positions reduced by 20% in 2 years
 - Update: Without Instructors increased **11.25%**
 - With Instructors increased **3.26%**
- b. Succession planning
 - i. Within one year, 100% of SC's to provide RC with 2 possible successors
 - ii. Grooming – 50% of DC's have an assistant/successor within one year

2017 Tax-Aide Program Goals

2. Developing more leaders

c. Mentoring

- i. Identifying possible future leaders and keeping a list of at least 5 at the SC level
- ii. Inviting future leaders to meetings like State Meeting
- iii. Build more “assistant-to” positions throughout organization
- iv. Better explanation of Tax-Aide volunteer organization structure

2017 Tax-Aide Program Goals

3. Maintaining quality

- a. Develop QR process for all sites based on a set standard review protocol
 - i. Standard module on how to perform QR for dedicated review
 - ii. Standard module on how to perform QR for peer review
 - Update: In Development
- b. Require NTTC QR training program
 - Update: In Development
- c. Develop an evaluation tool to measure our accuracy rate by 2018

Vermont Tax-Aide Program Goals and Activities

1. Recruiting more volunteers

- a. Local marketing focus/word of mouth
 - i. Broaden recruitment articles to include non-tax prep positions
 - ii. Use OSHC articles
 - iii. Improve the conversion rate of prospects

- b. What should we do for Onboarding?
 - a. Contact prospects within a few days
 - b. Follow-up as needed
 - c. Consider mentoring

Vermont Tax-Aide Program Goals

2. Developing more leaders

- a. Reduce number of positions leaders hold
 - a. Can you go away for 2 weeks during the tax season?
- b. Develop SMT Model at District Level
- c. Succession planning
 - i. Identify possible successors
 - ii. Groom, mentor, train, assign
 - iii. Invite future leaders to meetings like State Meeting
 - iv. Build more “assistant-to” positions throughout organization

Housekeeping Bits, Useful Info, Etc.

- OSHC: Tax Prep Tools and Helpful Weblinks
 - <https://aarpfoundationtaxaide.zendesk.com/hc/en-us/articles/212941263-2016-Tax-Prep-Tools-and-Helpful-Weblinks-2017-03-05> (perhaps add to website?)
- MyRA is gone
- Recruiting for PCS / PVS – VT Tax-Aide-wide email
- Equifax hack may result in more clients early in the season
- New Tri-Fold; order new for all counselors
- Reimbursements due by Dec 20