

**SELECTED PILOTS –  
MENTORING  
SAVINGS**

**ONBOARDING/**

October 2017

**AARP** Foundation®

# Onboarding and Mentoring Pilots

The brainchild of the Recruitment and Retention Task Force, Tax-Aide is conducting a pilot with 11 Districts to cull best practices around onboarding and mentoring prospective and new volunteers.

# Onboarding and Mentoring Pilots

## Main Objectives:

- Follow how a selection of AARP Foundation Tax-Aide Districts conduct onboarding of prospects, including mentoring and recognition of volunteers.
- Measure how these activities impact volunteer retention and recruitment in District.
- Collect best practices with the intent to develop nationwide standard onboarding and mentoring guidelines to be recommended to Tax-Aide volunteer leadership and ultimately shared (by mid-2018) with local volunteer leaders nationwide.

# Onboarding and Mentoring Pilots

## Pilot Activities:

- Collect information from pilot Districts to gain a benchmarking of how they currently conduct onboarding, mentoring, and recognition activities. (completed)
- Continue contact with Districts from August through 2018 tax season via phone conversations and online survey tools.
- Provide pilot Districts with draft strawman of possible national standard guidelines to gain input.

# Onboarding and Mentoring Pilots

## Pilot Participants

### **GA1 - D1**

Linda Garyantes

### **IN1 - D13**

Doris Wittenburgh

### **ME1 - D2**

Joan Jag

### **OH1 - D12**

Barry Fellabaum

### **OH3 - D18**

Virginia Wieland

### **PA1 - D34**

Ray Quickel

**Volunteer Lead:** Dan Arnold

**Staff Lead:** Rosa Maymi

### **PA1 - D6**

Ray Emplit

### **SC1 - D7**

Lula King

### **SD1 - D1**

Tas Tellinghuisen

### **TN1 - D10**

Pam Holcombe

### **VA1 - D3**

Glen Jurmann

# Savings Pilots

## **2018–2020 AARP Foundation Strategic Objective:**

*Objective 8 – 10% of 740,000 of LI50+ Tax-Aide participants who receive a refund will start or grow their contribution to a savings program in 2020*

# Savings Pilots

## Year One – 2018 Tax Season

Conduct pilots to educate on and track savings among Tax-Aide users.

# Savings Pilots

## Planned Pilot Participant Structure

- total of 4-6 sites in 3 geographically dispersed Tax-Aide Regions, with a mix in structure (e.g., size, walk-in/appointment)
- provide education about the benefits of savings via either passive or direct education approaches
- leverage CFPB (Consumer Financial Protection Bureau) tax-time savings initiative



# Savings Pilots

- not intended to provide financial advice nor to highlight any particular product
- intended to increase understanding about what practices encourage tax-time saving and the impact of saving on consumers' long-term financial health