

August 20, 2014

To: AARP Foundation Tax-Aide Volunteers

From: Bonnie Speedy, VP and National Director, AARP Foundation Tax-Aide

Subject: CyberTax TY2014-01: Diversity Outreach and Diversity Site Bundles

The AARP Foundation Tax-Aide Diversity Tax Site Bundle is back! We extend our thanks to all of last year's champions who launched sites and we stand by to help you do more this upcoming year.

**Goal of Initiative** – Tap into your willingness and passion to start up new AARP Foundation Tax-Aide sites in primarily diverse communities. The communities should be underserved, meaning no other Tax-Aide site in the zip code or have a demonstrated need and sufficient population to support another site. This year, we aim to receive one application per state and, minimally three applications from each region.

There are a number of reasons why opening a diversity tax site is important, so we will highlight a few. We know that Tax-Aide volunteers believe that one way to really help low income taxpayers is to offer essential and free, quality tax preparation services ensuring that taxpayers save money on tax preparation fees, get all the refund and credits they deserve and are not up-sold services and products not needed or, worse yet, flat out scammed. Without citing scores of research that is out there, I believe you will allow me to state the following. People who are diverse are more likely to be poor and people who are poor can lack the resources, financial, transportation, and otherwise, to seek out and find competent help with taxes. All of you make a significant difference in the communities in which you live by volunteering with the AARP Foundation Tax-Aide program. There may be a community near you that you know about which could be some of these diverse communities we have continuing opportunity to find and serve. As you well know and tell us regularly, giving back makes the heart feel good. We asked Dave Martz, a Local Coordinator in the Denver, Colorado Metro Area, and founder of a Tax-Aide diversity site to share his thoughts. Dave and his wife, Kathy, started a diversity site four tax seasons ago, after seeing an underserved community in their neck of the woods. They partnered with Centro San Juan Diego, a local Hispanic community organization, who provided space and volunteer recruitment.

With the heart and advance tax preparation skill set of Dave and his team, and the warmth of the community partners, this was sure to be a successful endeavor in this predominately Hispanic community in north Denver, Colorado. During the first year, TY2010, dedicated Tax-Aide volunteers, with translators, prepared 100 federal tax returns. It has grown every year, with a change beginning the second year to host site recruited bi-lingual tax counselors. Training also transitioned from English only with the addition of Spanish speaking instructors. With this, it more than doubled the number of counselors passing the certification tests. With a newly built trust by the community, they prepared about 500 federal tax returns in TY2013. This remarkable growth is heartwarming, where Dave and Kathy, who also is a Tax-Aide volunteer, know that they are making a significant difference in this predominately Latino community. Because the success of the site has rippled so much throughout the

community and the need so great, they have been asked to open two more sites in neighboring areas. In the words of Dave and Kathy, "we are extremely proud of our successes with the Centro San Juan Diego Tax-Aide site. We believe we have made a difference in the community. We have gained so much from volunteering there, as we feel that we are truly part of the Hispanic community family, learning so much about their culture and embracing it. We are honored to have been included in the many year-long activities at Centro." We hope you will join Dave and Kathy to bring Tax-Aide to other diverse markets by applying for a Diversity Tax Site Bundle and opening a site in a multi-cultural community.

**Bundle Includes** – A starter kit: Three laptops, one printer, a hotspot (if necessary) and a modest budget of up to \$500 for promotion (with a spending plan which will be approved separately) to start up a new site in primarily diverse communities (defined loosely as zip codes with 70% or more collective non-Caucasian population). Based on budget, all applications may not be approved this year, but our expectation is that most will be.

**Application and Approval Process** - the application is open to all certified volunteers. the application process will remain open; however the early bird deadline is september 15, 2014. early bird applicants will receive a response from the national office by october 8, 2014. Applications received after September 15 will still be considered to the extent funds are available. Any applications received after the early bird deadline will be responded to within three weeks. All applications will be reviewed by volunteers and national staff. At this stage of the process, you do not need to check in with your formal leadership. We will work with them directly as we approve applications.

We understand that setting up a site isn't a snap, so that is why we are offering volunteers some help through the diversity bundles. If you are interested, complete the attached diversity tax site bundle application and leverage our starter kit for setting up sites in diverse communities. We want you to apply! If you're a Counselor (and most of you are) and you see an opportunity here, be bold. Go for it!

Thanks for all you do.

Attachments with this message:

Diversity Site Bundle Application 2014.docx