

Date: March 16, 2015

To: All Volunteers for AARP Foundation Tax-Aide (with a valid email address in VMIS)
From: Bonnie Speedy, Vice President and National Director, AARP Foundation Tax-Aide
Subject: CyberTax TY2014-09: Message from Bonnie Speedy, AARP Foundation Tax-Aide

Dear Tax-Aide Volunteer:

Yesterday marked a month left in the tax season! We, you, are more than halfway done and in the home stretch. Please know how appreciative we are for your perseverance this season. I know from years of working with you that your driver is helping those taxpayers. With ACA, TaxWise issues and more snow and ice than many of us have seen for a while, this season has had extra hurdles to clear. Many of you are adding hours and/or days to schedules to try to get the tax returns “all” done. On behalf of those taxpayers, who may not quite know all the extra efforts you have made this year, thank you!

I also wanted to let you know that we have taken the literal list of issues with TaxWise and CCH very seriously. Veronica Coates, our program Technology Manager, has been in constant contact with them. Nearly all of the issues are resolved BUT we are very aware of the toll it took on you this season on top of ACA and weather. Veronica and I had a sit down meeting here at AARP Headquarters with the President of CCH SFS and the VP/General Manager of Commercial Services of CCH SFS. Also at the meeting were the IRS SPEC Director, our lead IRS executive, and our IRS Relationship Manager. It was a two-hour meeting with frank discussion around the issues, especially the outages and those issues still unresolved. We also spent significant time helping these most senior level staff at CCH SFS understand how you work at sites and how these issues affect you, especially when you have plenty of non-TaxWise issues going on as well. Our work model is unique with only volunteers in the field and volunteers leaders, not paid staff, managing sites, districts, states and regions and the additional detail was quite helpful. We will be traveling to their headquarters after the season to share our issues and work model (again) more broadly among a larger group of staff at CCH SFS. We did that a few years ago, but this is a good time to do it again as a post-mortem for learnings and improvements needed.

We also addressed and will continue to work with the IRS on issues of slow-to-press ACA procedures and needed clarifications, some even hitting after the season started. In the 15 years I have lead this program and including four of those I was a member of the full IRS and in-depth focused IRS Advisory Council, ACA was the largest single impactful tax issue I have ever seen. It also had need for substantial interaction with other agencies, which inherently complicates process development and communication. The good news is that the first year is near past us. Obviously changes and clarifications will happen but in the scheme of implementation management, getting the first year behind us is big!

It seems with the timing of the tax season, that we are simply destined to face all the weather issues the weather gremlins desire to throw at us. I do understand that getting issues we can resolve resolved will go a long way toward making the season more pleasant, tough weather or not, and allow you do what you do best, help taxpayers!

I want to end where I began, with a huge thanks! Your extra resilience to push through this year is very, very appreciated. Hoping your taxpayers are showing you the love and appreciation you deserve as it is the reason you give so much through this program and what you get back.

Bonnie

Bonnie Speedy - Vice President and National Director
AARP Foundation Tax-Aide