

Policy CO1-04: Processing a Prospective Volunteer (PV)

Background. Prospective Volunteers enter the Tax-Aide program in many different ways. Most come to the Tax-Aide program from local recruiting activities, generally done at the district or site level during or before the tax season. Nationally, volunteers are recruited year-round through the AARP volunteer opportunity board and the Tax-Aide website.

It is important to recruit volunteers from a population representative of the diversity in the community in which they will serve. This is especially true for communities with an ethnic concentration or a significant number of residents with English as a second language.

Many individuals presented to Tax-Aide as Prospective Volunteers have not indicated experience or interest in tax preparation, but still have skills that may benefit the Tax-Aide program. Recruiting efforts for these volunteers should emphasize these secondary skills and interests as they relate to other areas of the Tax-Aide program.

The process of bringing a volunteer into the Tax-Aide program (called “on-boarding”) is managed by the Prospective Volunteer Specialist (PVS), District Coordinators (DC) and Administrative Coordinators (AC). The process in CO1 does not deviate substantially from National Operations Committee guidelines.

Policy. All Prospective Volunteers to CO1 Tax-Aide should be contacted within 10 days of entering the Portal. All PV will be assessed for their best fit in the program, with every effort made to not turn away qualified volunteers.

Implementation. The process to on-board Prospective Volunteers in CO1 is outlined in Figure 1. Actions that take place automatically in the Volunteer Portal are indicated in yellow. Actions taken by the PVS are shown in blue, and actions that should be completed by the DC or a representative, are in green.

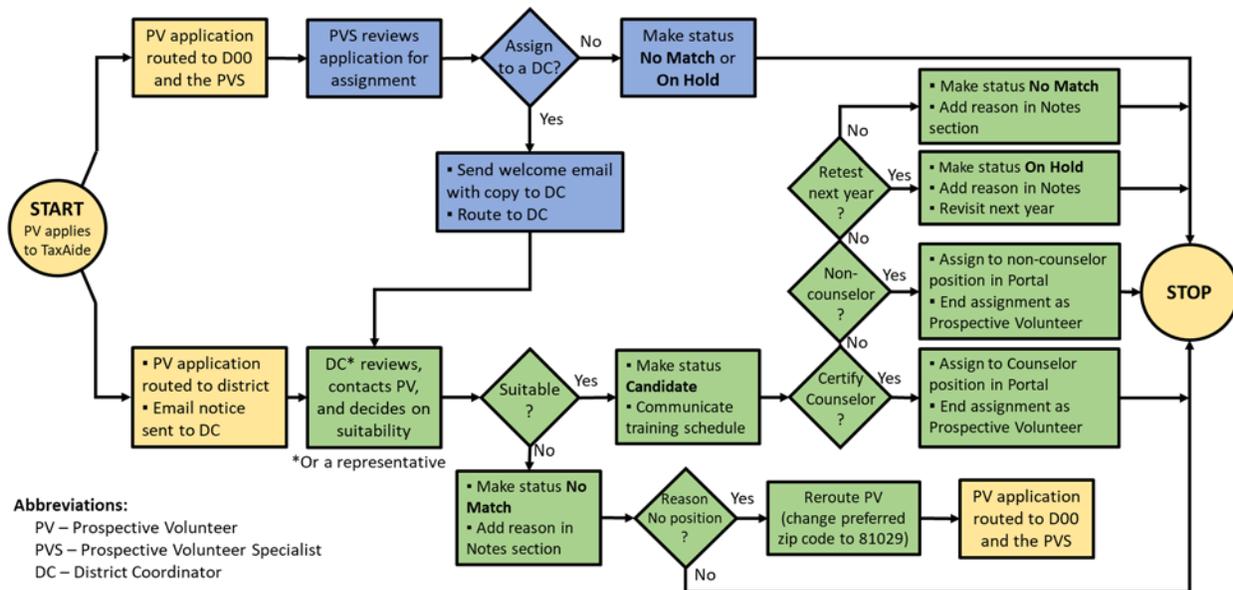


Figure 1 - Prospective Volunteer Process

Volunteer Enters the Portal.

When a volunteer enters the system, they are assigned to the position “Prospective Volunteer” with the status “Submitted.” There is no start or end date. The PV is automatically routed to a district based on the volunteer’s zip code and an email is sent to that DC and PVS. If the PV has a zip code that is not associated with a district, they are routed to D00.

Actions by the PVS.

If the volunteer is routed to D00, the PVS reviews the volunteer’s application to determine which district, if any, is best suited for the volunteer. If the PVS determines that there is a district that fits the PV, the PVS will send the PV an email message welcoming them to the Tax-Aide program and copies the DC for that district. The PVS then routes the PV to the district. This ends PVS action on the volunteer.

If the PVS determines that there is no Tax-Aide program in the PV’s area, the PVS will send the PV an email message thanking them for volunteering and informing them that there is currently no Tax-Aide program in their area. The PVS changes the status of the PV to “No Match” or, if there is the prospect of a Tax-Aide site opening near the PV in the future, changes the status to “On Hold.” If the status is “On Hold,” the PVS will revisit the PV application the following year. This ends PVS action on the volunteer.

Throughout the process the PVS will be attentive to volunteers that have qualifications that may make them suitable for a State Management Team position or other leadership or technical position.

Actions by the DC or a Representative (denoted by DC/R in the following).

While the DC retains overall responsibility for the management of the volunteer program in their district, some or all of the actions taken with respect to PVs may be delegated. Actions that require changes or updates in the Portal may be delegated to the AC. Other actions (contacting the PV, assessing suitability, etc.) may be delegated to the AC or a Local Coordinator (LC).

When a DC receives a PV, whether routed automatically or forwarded from the PVS, the DC/R will review the PV application, contact the PV, and make a determination on the potential suitability of the PV for the Tax-Aide program.

If the DC/R determines that the PV is not a good fit for Tax-Aide, they will change the status of the PV to “No Match” and select a reason from the drop-down menu. The DC/R should also enter a short explanation in the Notes section of the PV record in the Portal.

If the reason for “No Match” is “No Position Currently Available,” the DC/R will leave the status unchanged (i.e., the status will remain “Submitted”) but will add the note “No Match for Dxx – No position currently available” in the Notes section and changes the preferred zip code in the PV Contact Record to 81029. This will cause the PV to be routed to D00 for PVS action. This ends DC/R action for the PV.

If the DC/R determines that the PV is a good fit for the program, he or she changes the status of the PV to “Candidate” and schedules the PV for certification training.

If the PV fails to certify as a Counselor, the DC/R should determine if the PV would fit a non-counselor position such as Client Facilitator or Greeter. If the DC/R determines that the PV is not a good fit for a non-counselor position or if the PV fails to certify altogether, there are two possible actions that can be taken:

- The PV can be scheduled for training the following year. In this case the DC/R changes the status of the PV to “On Hold” and revisits the application the following year. The DC/R should enter a short explanation in the Notes section of the PV record in the Portal.
- The DC/R may decide that the PV is not a candidate for the Tax-Aide program. In this case the DC/R changes the status of the PV to “No Match” and selects a reason from the drop-down menu. The reason can be any of those available EXCEPT “No Position Currently Available.” The DC/R should also enter a short explanation in the Notes section of the PV record in the Portal.

This ends DC/R action on a PV who fails to certify.

If the PV successfully certifies, the DC/R then assigns the volunteer to a permanent position along with a start date. Assigning the volunteer to a permanent position will automatically generate a welcome email that includes the volunteer’s ID and an invitation to log in to the Portal. After this is done, the DC/R ends the PV’s assignment as Prospective Volunteer.

This process of assignment and de-assignment must be done in this sequence or the system will believe the PV has terminated their association with Tax-Aide and generate a “Thanks for Volunteering” letter from the AARP Foundation. This ends DC/R action on the PV.

References.

AARP Foundation. *The Policy and Procedures Manual of Tax-Aide, 2019-2020.*

AARP Foundation. *The Volunteer Portal Guide, Section 4, 01/01/2019.*