

## Senior Corps Work Plan SAMPLE

<b>Work Plan Name:</b> Tax Consulting – Sample 1 (RSVP)	<b>Work Plan ID:</b> PAA13028
<b>Issue Area:</b> Community and Economic Development	<b>Total # Stations:</b> 2
<b>Service Category:</b> Tax Consulting/ Counseling	<b>Total # Volunteers:</b> 10
<p><b>Community Need:</b>  According to the Golden County Office on Aging 2004 Report, elderly and low-income individuals need assistance in filing their Federal, State, and Local income tax returns. For most of the people served by this program, getting help with their taxes through normal tax accounting services is unaffordable. Many in the elderly and low income people feel anxiety and stress due to fear of incorrectly completing the documents, according to the report. Therefore, volunteers are needed to assist these individuals with preparing their Federal, State and, Local income tax returns. RSVP volunteers will provide tax preparation and filing assistance to elderly and low income persons in the community through the IRS Volunteer Income Tax Assistance Program (VITA).</p>	
<p><b>Service Activity:</b>  Ten (10) RSVP volunteers will assist elderly and low-income individuals prepare their Federal, State, and Local income tax returns, and related forms including Pharmaceutical Assistance Contract for the Elderly (PACE) applications, and Rent and Property Rebates through one-on-one counseling, in person or over the telephone. These services are provided free of charge to low income and elderly persons through the IRS VITA program. Services will take place at two offices, the Golden Community Center and the IRS office in Golden County, and be supervised by an IRS staff member.</p>	
<p><b>Anticipated Input:</b>  The ten RSVP volunteers will each contribute an average of ninety (90) hours of service over the three month time period (tax season) for a total of 900 volunteer hours. Included in the 90 service hours, RSVP volunteers will each serve an average of 18 hours attending IRS-VITA tax classes to learn how to complete various tax returns, PACE, and Rent/Property Rebates. Training and materials will be provided by both the State Department of Revenue and the IRS through their taxpayer education office. RSVP volunteers in this program must receive federal certifications in order to assist with tax assistance. The RSVP program will assist with facilitating the tax training sessions, scheduling of volunteers at each workstation, and will provide supplemental insurance coverage for each RSVP volunteer (excess automobile, medical, and liability) and recognition for the volunteers. The Golden County IRS office and Golden Community Center will provide office space and materials (use of phone, computer, fax, supplies).</p>	

**Anticipated Accomplishments/Outputs:** Elderly and low income people will receive one-on-one assistance in filing tax and other government forms.

**Indicator:** Number of elderly and low income people who receive assistance

**Target:** Three hundred (300) people will receive assistance in filing their Federal, State, and Local returns, PACE applications, and/or Rent/Property Rebates.

**How Measured?** *Client Log*

**Anticipated Intermediate Impact/Outcome:** Elderly and low-income individuals will have complete and accurate Federal, State, and Local income tax returns.

**Indicator:** Percent (%) of Federal, State, and Local income tax returns judged complete and accurate by IRS-VITA supervisor

**Target:** Eighty percent (80%) of elderly and low-income individuals will have complete and accurate Federal, State, and Local income tax returns.

**How Measured?** *Client Assistance Tracking Sheet*

**Anticipated End Impact/Outcome:** Elderly and low-income individuals will feel less anxious concerning their tax filings and will directly attribute their increased comfort to the correct completion of their tax returns.

**Indicator:** Percent (%) of clients surveyed who feel less anxious upon the completion of their tax returns (e.g., confident that return is correct; relieved that process is finished; less anxious about future tax returns)

**Target:** Sixty percent (60%) of elderly and low-income individuals surveyed will report feeling less anxious about the tax filing process.

**How Measured?** *Client Satisfaction Survey*