

Senior Corps Work Plan SAMPLE

Work Plan Name: Tax Consulting – Sample 2 (RSVP)	Work Plan ID: ARA13036
Issue Area: Community and Economic Development	Total # Stations: 3
Service Category: Tax consulting/counseling	Total # Volunteers: 50
<p>Community Need:</p> <p>According to the 2000 census, approximately 75% of individuals age 65 and over live in poverty in Arkansas’ Juneau and Tulle counties. For a variety of reasons, the elderly poor often experience difficulties understanding increasingly complex tax codes and completing their returns. For example, this group includes a large number of persons who are completing taxes for the first time due to the loss of a spouse or domestic partner (Governor’s Report on Senior Health and Well Being, 2003).</p> <p>Insufficient knowledge about accurate tax return completion can place an additional financial burden on lower income populations. Those who experience problems understanding multiple tax forms may inadvertently miss credits and deductions for which they are eligible. Among the elderly, health problems can also exacerbate difficulties experienced in completing tax returns.</p> <p>For these reasons, members of this population often need to rely on others for tax preparation assistance. RSVP volunteers are in a position to assist this group to complete tax forms while helping them better understand tax credits, requirements, and responsibilities.</p>	
<p>Service Activity:</p> <p>From February 1 through May 1, RSVP volunteers will help low income individuals, age 65 and older, throughout Juneau and Tulle counties to prepare federal, state, and local tax returns. Service will take place at three locations: Juneau RSVP office, the Juneau Senior Center, and the Tulle Public Library. Volunteers may also serve homebound individuals who are unable to come to a site location at their residences or over the telephone. The service entails one-on-one tax counseling and preparation. In addition, volunteers will use some of their volunteer hours to help publicize their services.</p>	
<p>Anticipated Input:</p> <p>Fifty (50) volunteers will help prepare tax returns for approximately 1,000 low-income persons age 65 and over. Each volunteer will serve approximately 120 hours, including 40 training hours. Together, the volunteers will serve a total of 6,000 service hours.</p> <p>The 40 hours of specialized tax preparation training will be provided by trained IRS and AARP volunteers. Juneau RSVP, Juneau Senior Center, and the Tulle Public Library will provide office space for service and training, and local businesses will donate additional office equipment, computers, and supplies. Two IRS volunteers will be available for questions on-site or by telephone.</p>	

Anticipated Accomplishments/Outputs: Low-income persons age 65 and over (clients) will receive help completing federal, state, and local tax returns.

Indicator: Number of low-income persons age 65 and over who receive one-on-one counseling assistance

Target: At least 1,000 low-income clients age 65 and over receive one-on-one counseling services to complete their federal, state, and/or local tax returns.

How Measured? *Tax Counseling Roster*

Anticipated Intermediate Impact/Outcome: Clients' tax returns are completed accurately.

Indicator: Percentage of completed tax returns that are completed 100% accurately.

Target: Ninety percent (or 45) of a sample of 50 tax returns that are completed with the help of RSVP volunteers are judged 100% accurate by IRS volunteers.

How Measured? *Tax Return Assessment Log*

Anticipated End Impact/Outcome: Client report an increase in knowledge about the accurate completion of their tax returns.

Indicator: Percent of clients reporting an increase in knowledge about the accurate completion of their tax returns (e.g., knowledge of deductions and credits for which they may be eligible)

Target: At least 60% of clients (60 of 100 clients sampled) will report an increase in knowledge about the accurate completion of their tax returns.

How Measured? *Client Exit Survey*