**TaxAide Volunteer Recruiting**

**Partnerships with Local Colleges**

There are pros and cons for soliciting college students as TaxAide volunteers:

* Pros:
  + Most students are eager to learn and participate;
  + They learn quickly; as college students they are conditioned to learning/studying; they have terrific keyboarding skills and computer savvy
  + Older, experienced volunteers are often energized by their interaction with the students
  + Clients generally enjoy the interaction with the students
  + Students are often willing to volunteer evenings and weekend, times that are more difficult to staff with our experienced community volunteers
  + It increases the volunteer base, therefore allowing more returns to be done
* Cons:
  + Generally, student volunteers are only available to volunteer one to two years;
  + Due to first semester exams and semester break timing, traditional classroom training may not be possible
  + A large number of new volunteers can put additional burden on Quality Reviewers, particularly if the students are primarily at one site
  + Occasionally some students may prove to be unreliable (but this can be true of our general community volunteers as well)

However, good the planning and with good cooperation from the institution, colleges and universities can be a valuable source of volunteers. For districts who have had successful partnerships with local colleges, this paper provides some ideas and best practices to help maximize the “pros” and reduce the effects of the “cons”.

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1. **Find a strong advocate for the TaxAide program at the college/university**
   1. This is critical; you need someone on the “inside” to help promote volunteering with TaxAide
   2. This might be someone in the career office who manages internships, or a key faculty member in the accounting or general business department, someone from the community relations department, or perhaps the dean of the business school
   3. The institution needs to be approached at the right time:
      1. Times that are not good: spring graduation time, summer break, fall semester start-up
      2. Times that might be good: March/April (to plant the seed for the following year); mid-to-late September once the students have settled in.
   4. Selling points to faculty/administration:
      1. TaxAide offers great hands-on experience; gives a student an opportunity to interact on a professional level with our taxpayers.  They “own” the return from inception to completion.    This is generally not what happens when a student has an internship in an accounting firm.  Most work in a back room with computers and interact only with their immediate supervisor.  They are seldom permitted to deal directly with taxpayers.
      2. Our comprehensive training complements the business curriculum
      3. Volunteers become IRS certified
      4. Our experienced tax counselors serve as great mentors and on-the-job trainers
      5. This experience looks great on student resumes
      6. The institution receives positive publicity for participating in community activity and promoting volunteerism from the student body

*Notes: The advocate for the Mount Saint Mary College program (Kathleen O’Keefe) would be willing to discuss the benefits to the college and students with potential advocates from other institutions. Contact information: Phone 845-569-3180 Kathleen.Okeefe@msmc.edu*

*Additionally, Dr. Gaber, from SUNY Plattsburgh is willing also to discuss benefits. Contact: Mohamed Gaber, Ph.D., Professor and Chair, Department of Accounting, School of Business and Economics, SUNY Plattsburgh, E-Mail:* [gabermk@plattsburgh.edu](mailto:gabermk@plattsburgh.edu)  *Office Phone: (518) 564-4198*

* 1. Items to discuss with the advocate for the institution:
     1. The best way to recruit student volunteers
     2. Whether credit might be offered for participation and what the ground rules for this would be for obtaining credit
     3. Will the school require student evaluations following the tax season? In what form?

1. **Student Recruiting**
   1. Engage the college/university advocate in developing the recruiting plan
   2. Some effective approaches:
      1. Flyers, posters in the buildings where business classes take place
      2. Email or text communication to alert students to this opportunity
      3. Visits to actual classrooms (by the school advocate or a TaxAide rep) to briefly explain the program and how to sign up (emphasize that initial sign-up does not carry an obligation to follow through – it just indicates interest in the program)
      4. Presentations to business school student professional societies (many schools have something like this)
      5. Presentations to faculty members to get them to promote this with the students
      6. Participate in internship fairs on campus
      7. Use past student interns to recruit new interns
   3. Incentives for the students:
      1. Great training on income tax preparation
      2. Real hands-on experience with clients that enhances their resume
      3. (With agreement from the college/university) college credit(s) might be earned by participating
      4. Many employers value community service; another plus for student resumes
   4. It’s great to try to get volunteers in their sophomore (or even Freshmen) year – could provide your program with 2-3 years of service
2. **Student Orientation & Training**
   1. Obtain from the institution advocate the school schedule:
      1. When do first semester exams take place?
      2. When do students get their class schedules for second semester?
      3. When is semester break?
      4. When does the second semester begin?
      5. When is Spring break?
   2. Consider an orientation session after the recruiting period end and before training begins
      1. Explain the program in more detail
         1. This is an unpaid internship
         2. Training & certification
         3. The help they will receive from experience volunteers
         4. The mentor program for training (if you have one)
         5. Where the tax sites are
         6. What takes place at the tax sites
         7. Quality Reviews are done (two sets of eyes; they will not be ‘on their own’)
         8. Number of hours they are expected to volunteer
         9. Mileage reimbursement
         10. Opportunity for credit (if applicable)
         11. Emphasize the importance of professionalism (being on time, being courteous to clients, etc.)
         12. Explain the role of client facilitator -some students who have not yet started their accounting courses may wish to begin getting experience by serving as a client facilitator
         13. End-of-tax-season evaluations (if applicable)
      2. Get feedback from students
         1. Are they still interested?
         2. Do they live locally, or far away (important for training and Spring break)?
         3. Do they feel that their classroom, other work obligations, and extracurricular activities will allow them time to participate?
         4. What is their transportation situation? Will they have difficulty getting to some of the tax sites?
      3. Determine the right training plan for the students based on their situation
         1. Classroom sessions for students who can participate in this manner
         2. An effective remote training approach for those who cannot attend the classes – typically:
            1. Some type of training kick-off session while students are still on campus

Introduce them to training materials and on-line training

Introduce them to the tax preparation software

Provide them with assignments (specific exercises to be completed) for semester break

Provide them with a mentor or other people to contact for help

* + - * 1. Keep in touch via email and phone to provide help during semester break
        2. Perhaps have them attend one or two classes in mid-to-late January when they return from semester break
        3. Guide them through to certification
      1. Consider on-campus training activities, if the college/university will provide the right facilities
    1. You will need to find the most effective way to communicate with students; today’s teens are generally more tuned into text messages than they are to emails

1. **Staffing at the sites**
   1. The ideal situation is usually to spread the students over several sites, integrating them in with experienced teams where there is plenty of help; having a large base of students at one site where there is very little experienced help can be a challenge
   2. Transportation can be an inhibitor here – so it is helpful to obtain information on transportation limitations early in the process (before training begins)
   3. Student schedules can be a limiting factor here as well; try to get student availability times (for the second semester) as early as possible – doing this before the students go through training is best, in case there is a potential volunteer whose schedule does not line up with any of the tax sites
   4. Be sure to look ahead to Spring Break to see if there will be an impact to student availability
2. **Tax Preparation Period**
   1. Insure that students are introduced to the rest of the site team and that local site procedures are explained to them
   2. Quickly address any issues that might come up with the student participation (ex: tardiness)
   3. Look for opportunities to publicize the school/student involvement; local newspapers and college newspapers are generally interest in showing college-community connections
3. **Tax Year Wrap-up**
   1. Be sure to thank the students and the school for their participation
   2. Explain once again mileage reimbursement eligibility and assist students in navigating the portal to submit their mileage reimbursement requests
4. **Some current NY3 partnerships and their established practices**:
   1. ***NY3-2 and SUNY Plattsburgh*** (>10 years of experience)
      1. Contact: Marcia LaPierre [MarciaLaPierre@westelcom.com](mailto:MarciaLaPierre@westelcom.com)
      2. Average number of students recruited each year: anywhere from 6 to 20 Accounting majors (usually Juniors and Seniors)
      3. Type of support from the school: The Chair of the Accounting Department heavily promotes the internship. The school provides use of computer labs for training both students and adult volunteers.
      4. Recruiting approaches: Two TaxAide program reps present an overview of the program (with handout) to the Income Tax classes in the fall. All students are given contact info and a mandatory meeting date if they are interested in participating. Additionally, AARP TaxAide participates in the Internship Fair held in the fall for the School of Business at SUNY Plattsburgh.
      5. Training approaches: One mandatory meeting in the fall, to introduce the students to the training materials, the tax software, get user ID's and get them registered with AARP. Self-study is promoted. Once they pass the IRS certification exams, they are invited to attend another mandatory meeting on the Sunday just prior to the opening of the site, where they receive NYS training, Policy and Procedure training, site orientation and receive their shirt and nametag. Once the site opens, each student works one-on-one with an experienced volunteer (Mentor), first observing a tax return preparation, then preparing at least one return themselves while being supervised by the mentor until both mentor and student are comfortable that the student is ready to work on their own.
      6. College credit opportunity: most students receive 1 credit for a minimum of 40 hours, additional credits are available (1 credit for each 60 hours over the original 40, up to 3 credits)
      7. Use of school facilities:
         1. For training: Computer lab available for our use - one afternoon a week during the fall semester and 3 evenings a week during the school winter break in early January.
         2. For tax site hours: The site is 2 blocks away from the school
      8. Other notes
         1. The TaxAide program is highly regarded by the school and students
         2. Student evaluations are provided by TaxAide leaders at the end of tax season
         3. We have several students each year who are doing a second or third year
         4. The following is a YouTube video about the partnership with SUNY Plattsburg [**https://m.youtube.com/watch?v=AUd9gYxEfFA&autoplay=1**](https://m.youtube.com/watch?v=AUd9gYxEfFA&autoplay=1)
   2. ***NY3-8 and Mount Saint Mary College*** (approx. 6 years of experience)
      1. Contact: Dave Weaving, New Volunteer Coordinator Dweaving@optonline.net
      2. Average number of students recruited each year: 15-20
      3. Type of support from the school:
         1. Advocate is the Associate Director of the MSMC Career Office;
         2. She attends TaxAide/CA$H meetings
         3. She promotes the program by visiting classrooms and giving an overview
         4. She works with individual students to get them involved in the program; recommends some of them for credit
      4. Recruiting approaches:
         1. Visits to classrooms
         2. Posters
         3. Word of mouth from past participants
      5. Training approaches:
         1. For students who live locally, they attend our training classes
         2. Students who do not live locally:
            1. Orientation session before the first semester ends

Introduce them to training materials and on-line training

Introduce them to the tax preparation software

Provide them with assignments for semester break

Provide them with a mentor or other people to contact for help

* + - * 1. Keep in touch via email and phone to provide help during semester break
        2. Have them attend one or two classes in mid-to-late January when they return from semester break
        3. Last class: have them take the certification exam
    1. College credit opportunity: 2 students each year volunteer for 135 hours and get 3 credits
       1. Training counts towards the 135 hours
    2. Use if school facilities:
       1. For training - classroom is provided by the college to train students as well as some of the local community volunteers
       2. School facilities are not use as a tax site
    3. Other notes:
       1. The TaxAide program is highly regarded by the school and students; some students have turned down paid internships in order to get hands-on experience with us
       2. Evaluations are provided at the end of tax season
       3. Several students return for a second or third year
       4. Tax-Aide reps help to get good publicity for the school for their participation (local newspaper articles, etc.)
       5. Local prominent accounting firm reinforces with student the value of getting experience with our program
       6. Two former MSMC students who live locally have stayed with the program and are now Local Coordinators!
       7. With the help of a couple of very dedicated experienced volunteers, the on-campus tax site was a success; however, the best format was probably in the instance where some students were integrated with several experienced tax counselors in other sites
  1. ***University of Southern Maine (USM)*** (Started in 2011)
     1. Contact: Joan Jagolinzer, PCS, Maine jagolinzer@gwi.net
     2. Average number of students recruited each year: 2-6
     3. Type of support from the school: Advocate is an Accounting Instructor as well as School of Business Internship Coordinator
     4. Recruiting approaches:
        1. Visits to classrooms (10 minutes at the start of class 5 weeks into the semester)
        2. All accounting instructors are familiar with the program
        3. Orientation for both student and traditional volunteers is held in early December.   Initial prospects who applied for paid internships will know by the end of November if they have been chosen.  Hence, those students attending a December orientation are more apt to end up volunteering
        4. Potential applicants are provided with a one-page handout describing the program
     5. Training approaches:
        + 1. Training activity is worked out between the student, the local DC, the Tax-Aide instructor, and the school internship administrator
     6. College credit opportunity:
        1. Students may receive 3 credits (pass/fail)
        2. Training counts towards the 140 hours
        3. If they cannot meet the 140-hour requirement, some students opt to become to become “regular” volunteers.
     7. Other notes:
        1. USM has a high percentage of non-traditional students.   Many have families, attend school part-time and also work.    Hence, finding students who can fit an internship into their already busy lives is a challenge for both them and the Tax-Aide team.
        2. Orientation session for both students and traditional volunteers, includes a brief “skit” on how a site operates.
        3. Tax-Aide tells any interested students the locations, days and times that sites operate.   (Often a great prospective volunteer cannot fit his/her school schedule into available site times and/or locations.)
        4. As part of earning credits, the students must write 2 papers
        5. Tax-Aide writes a letter of reference for students who pass
        6. If requested, Joan Jagolinzer – [jagolinzer@gwi.net](mailto:jagolinzer@gwi.net) will provide a copy of the school’s internship contract.

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