

# A Message for Partners and Volunteers

## Strengthening Volunteer Return Preparation



### Key Messages

- **IRS is working with partners to strengthen volunteer return preparation programs.**
- **The work of partners and volunteers provides a critical service for the public.**
- **A joint IRS/partner team is working on a multi-year quality business plan.**
- **There may be program changes, as well as new products and services, as the definition of quality evolves.**
- **Milestones and successes will be shared with partners and volunteers as developments occur.**
- **Look for ACTION 2005 announcements from your IRS partners as new and revised products and procedures become available.**

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If you have been working with IRS and its volunteer return preparation programs, you may notice some changes to the program over the next few months in preparation for the 2005 filing season. IRS will be focusing on making changes that strengthen its business model for volunteer return preparation programs.

### Why are volunteer return preparation programs so essential?

Programs such as Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) provide important services for low-income taxpayers. You are part of a nationwide program that boasts almost 14,000 sites and 70,000 volunteers reaching nearly 2 million low-income and elderly people with needed tax preparation assistance.

As a partner involved in the program, you know that the qualitative experience of VITA and TCE is very high. Sites are organized, well run and provide privacy and security for clients. Taxpayers appreciate the assistance provided by volunteers, and the IRS recognizes and applauds these efforts.

You and your volunteers choose which programs—all competing for your time and resources—you wish to support. IRS realizes that you have chosen to commit time and resources to help the public with the complex task of tax return preparation. The IRS' quality improvement effort will provide you with tools that you need to reach a higher level of service to your taxpayers.

### How do volunteers impact the quality process?

Volunteers must ensure that they obtain complete and accurate information when they interview each taxpayer so that they have the proper basis for preparing each return. Up until now, your volunteer training and the quality review processes at volunteer sites have provided some guidance for this role. As you and your coalitions manage these programs, IRS must develop tools and resources to support your volunteers on the front lines. Since high quality service is critical to the volunteer return preparation program, we must continually evolve the way we deliver and assess quality in these programs.

Because taxpayers are relying on the integrity of volunteers, volunteers must adhere to a code of ethics to provide the best assistance for taxpayers and ensure return accuracy. Likewise, the taxpayer's role in the process is to provide full and correct information and disclosure to the volunteer to ensure they receive accurate assistance.

### **How is the definition of quality changing?**

While quality has always been important to the volunteer program, the definition of quality is shifting from one based solely on tax return information to one encompassing the full range of taxpayer/volunteer interaction. We are mapping the range of interactions between taxpayers and volunteers, and developing long-range plans that identify the tools and resources necessary to provide the best service at each step in the interaction.

### **What will be changing?**

Collaborating with partners like you, we are taking steps to address quality through shared perspectives and agreement on outcomes. A joint IRS/partner team is working on a multi-year quality business plan that will identify opportunities for intervention, clarify roles and responsibilities, produce tools for partners and volunteers to improve interactions, and provide a gateway to measure improvement efforts.

### **How can you be involved?**

Partners are already part of the redesign and implementation process at the national level. IRS will share with all partners the milestones and successes of our efforts to support volunteer return preparation programs. This joint effort will strengthen the business model for these programs, tying together all the elements involved in the process, including program resources (such as training, staffing, equipment, etc.), taxpayer/volunteer interaction, and return accuracy.

IRS will distribute information identified as **ACTION 2005** that will provide information about new products, tools and revised procedures that will impact the 2005 filing season. The first of these is an ACTION 2005 Fact Sheet that highlights the changes that have been announced so far, and contains some valuable information about new products and changes to established materials and practices. As always, work closely with your IRS relationship manager to make sure you have the latest information.

All the information for partners and volunteers will be available on the Partnering Opportunities section of the IRS Web site, which is available by entering the key word "community network" at [www.irs.gov](http://www.irs.gov), and scrolling down to the **Partner Products and Volunteer Resource Center**.