AARP Foundation Tax-Aide Program

Multicultural, Multiethnic Volunteer Recruitment and Taxpayer Outreach Initiative

Request for Proposals

Notice of Intent to Apply Deadline: October 31, 2014

Application Deadline: 11:59 PM ET, November 14, 2014

I. Background

AARP Foundation Tax-Aide is seeking proposals from non-profit organizations for two projects. The first project seeks non-profits that are interested in engaging its multicultural membership base to volunteer with the AARP Foundation Tax-Aide program. Nonprofits in this category may include, but are not limited to, entities that provide training, education forums, and professional development services to its network.

The second project seeks non-profits that provide program services or outreach and engagement in low and moderate income multicultural communities or have direct outreach and engagement primarily with low and moderate income individuals.

The proposed project(s) will assist us in 1) recruiting multicultural volunteers of all incomes to deliver tax services; and 2) reaching low to moderate income multicultural individuals to make them aware of the free tax preparation services available through AARP Foundation Tax-Aide nationwide. As Tax-Aide continues to grow, we are eager to reach underserved communities that represent the fabric of America, which means all backgrounds and all communities both rural and urban.

There are a number of resources available through AARP Foundation Tax-Aide for awarded grantees including:

- Access to Volunteer Registration Portal – recruited volunteers will apply at www.aarp.org/taxaide.
- Classroom and online training and mentoring for volunteers as provided by Tax-Aide.
- Professional continuing education credits available through the IRS for applicable professional audiences (i.e., CPAs).
- Outreach and recruitment materials (e.g., flyers, postcards, press releases, digital banner ads, radio spots, etc.).
- Media toolkits for volunteer recruitment and taxpayer outreach: pre-recorded 30 second and 15 second radio spots for a variety of audiences.
- Technical Assistance – Collaborate with the Tax-Aide staff to generate appropriate messages to reach your specific audiences.
Every year, AARP Foundation helps millions of older Americans who struggled to meet their basic need for nutritious food, safe and affordable housing, adequate income and much-needed personal connections. AARP Foundation helps struggling seniors by being a force for change on the most serious issues they face today. AARP Foundation has a longstanding commitment to legal advocacy on behalf of older Americans everywhere, and has identified four interrelated priority areas where we can have the greatest impact: hunger, income, housing, and isolation.

The AARP Foundation Tax-Aide program has provided free income tax assistance to persons with low and moderate incomes since 1968. In 2014, 35,000 compassionate volunteers at more than 5,000 tax sites, in all 50 states and the District of Columbia, provided 2.6 million people with free tax help. Taxpayers who used AARP Foundation Tax-Aide received $1.3 billion in income tax refunds and more than $257 million in Earned Income Tax Credits (EITCs). Based on a 2014 taxpayer satisfaction survey, 97% stated that they were highly satisfied with the service provided by AARP Foundation Tax-Aide.

While the AARP Foundation Tax-Aide program is extremely successful, there are still 19 million low to moderate income taxpayers that qualify for free tax preparation services. In order to reach more taxpayers, we need more volunteers and we need help reaching targeted audiences.

With the assistance of qualified organizations, we know we will be able to recruit more volunteers and provide this valuable service to more vulnerable taxpayers. Accepted activities under this grant opportunity are as follows:

- Marketing and Outreach through electronic and print communication vehicles to include, but not limited to newsletters, print publications, email alerts, social media; member/client events; and
- Program promotion by engaging low and moderate income audiences through community forums, electronic communication, publications, and program events.

II. Eligibility Criteria

To be eligible for this opportunity, respondents must be a non-profit organization and must fall in one or both of the following categories.

Category A: Volunteer Recruitment

- Proven access to and ability to reach a network of members/affiliated individuals.
- Proven internal communication systems to conduct marketing and outreach to members/affiliates and/or constituency base.
- Primary network/membership base represents multicultural/multiethnic communities.

Category B: Taxpayer Outreach

- Established track record of consistently reaching and providing services to the low to moderate income target market, with emphasis on the vulnerable 50+ constituency from multicultural/multiethnic communities.
- Successful communication channels that reach and engage clients for internal programs and/or initiatives through partner organizations.
- Primary client or membership base represents multicultural/multiethnic communities.
III. Grant Award Information

A. Potential Award Range
   • Minimum grant: $25,000
   • Maximum grant: $100,000

   Grant amount will depend on size of reach for Volunteer Recruitment and Taxpayer Outreach, whether applicant is submitting proposal for one or both categories, and if application is national in scope.

B. Grant Period
   • Category B: Taxpayer Outreach – January 1, 2015 - June 30, 2016

C. Reporting Requirements
   • Grantees will be required to submit calendar quarterly reports that provide programmatic and financial status of their project. The first quarterly report will cover project start through March 31, 2015 with all future reports covering standard calendar quarter. Reports are due 30 days after the end of the quarterly quarter. Quarterly reports will include programmatic, financial and participant metric data (when possible/applicable).

IV. Application Information

Applicants may submit one application for both categories by addressing all questions. In the online application, you will be able to select which category (or both) you are applying for.

Below the requested information are questions all applicants must answer as well as specific questions for each category.

A. Project Summary (400 characters limit)
   In a few sentences, briefly explain your proposed project including the geographic area you will serve and multicultural individuals you will reach.

B. Organizational Experience (6000 characters maximum)
   • Category A only: Volunteer Recruitment
     ▪ Provide an overview of your organization’s history and success with engaging your network to volunteer for social causes. Explain how you measured your success.
     ▪ Describe the tools, publications and other communication channels your organization uses to market and promote initiatives to your member network, as well as explain how you track your outcomes.
     ▪ Include an overview of the geographic area you and your volunteers serve.
   • Category B only: Taxpayer Outreach
     ▪ Explain the organization’s most impactful marketing and communication techniques used to reach underserved, low- and moderate-income audiences, especially in
multicultural/multiethnic communities. Provide details regarding the demographics of the individuals reached.

- How will the organization be able to use AARP Foundation Tax-Aide locations for free tax preparation services and how many low- and moderate-income multicultural individuals do will it be able to utilize AARP Foundation Tax-Aide services? Explain how success will be measured.
- Highlight the organization’s successes in reaching targeted audiences for internally operated initiatives and/or specific initiatives for partner organizations. How success measured?
- Include an overview of the geographic area organization serves.

C. Organizational Capacity (6000 characters maximum)

- Categories A & B: Volunteer Recruitment and Taxpayer Outreach:
  - Briefly describe the purpose of your organization, entailing the primary audience served and the services provided. Within the description include the socio-economic demographics by race/ethnicity of the audience served.
  - Briefly describe the organization’s experience with receiving and managing project based grants? In what ways did receiving a grant increase capacity to serve its target audience?
  - Provide an overview of the organization’s management team and the key personnel that will oversee the initiative.

D. Project Plan and Timeline (7000 characters maximum)

- Category A only: Volunteer Recruitment – typically conducted June – November
  - Describe recruitment techniques for members from the organization’s network to volunteer with AARP Foundation Tax-Aide.
  - Describe why organization’s members/affiliated individuals would want to volunteer for AARP Foundation Tax-Aide.
  - Describe how the project will be managed to ensure success, including organization individuals.
  - Describe potential project barriers and how they will be overcome.
  - Provide a brief implementation timeline highlighting major activities.

- Category B only: Taxpayer Outreach – typically conducted December - March
  - Describe organization’s approach to outreach to low- to moderate-income multicultural individuals and connect them to AARP Foundation Tax-Aide for tax preparation services.
  - Describe need of target population to access AARP Foundation Tax-Aide program.
  - Describe how the project will be managed to ensure success, include lead project staff.
  - Describe potential project barriers and how they will be overcome.
  - Provide a brief implementation timeline highlighting major activities.
E. **Budget Narrative** (2000 characters maximum)
   - Applicants’ budgets will be reviewed to ensure that they are reasonable and appropriate to meet applicants’ proposed program goals. Applicants’ budget narratives should align with proposed budgets. The indirect cost must not exceed 10% of direct expenses.

F. **Attachments**
   - Most recent audited financial statements and IRS 990 (if applicable)
   - IRS 501(c) designation
   - Brief bio(s) on the key personnel that will oversee this initiative
   - Project budget (using Project Budget Template)

V. **Review Criteria**

A. **Organizational Experience (40%)**
   The scoring criteria of the Organizational Experience section will be:
   - Category A: Volunteer Recruitment
     - Demonstrated experience in volunteer recruitment, particularly with multicultural individuals.
     - Relevant examples of activities undertaken by volunteers recruited.
     - Demonstrated success measures.
     - Relevant examples of outreach and engagement to volunteers.
     - Clearly stated geographic area including, as applicable, counties, cities, neighborhoods, etc.
   - Category B: Taxpayer Outreach
     - Demonstrated experiences in reaching low- and moderate-income multicultural individuals.
     - Clearly detailed demographic overview of individuals reached.
     - Specific examples on how AARP Foundation Tax-aide services will be utilized and by how many low- and moderate-income multicultural individuals.
     - Demonstrated success measures.
     - Specific examples of reaching targeted audiences for other partners.
     - Clearly stated geographic area including, as applicable, counties, cities, neighborhoods, etc.

B. **Organizational Capacity (20%)**
   The scoring criteria of the Organizational Capacity section will be:
   - Clearly defined organizational mission with specific examples on how the services provided further the mission of the organization.
   - Demonstrated experience in serving low- and moderate-income individuals.
   - Examples on how services provided by mission align with vulnerable 50+ and AARP Foundation Tax-Aide services.
   - Demonstrated commitment of organization’s management team to the project.
   - Alignment of key personnel’s experiences with project’s goals.
• Demonstrated experience managing grant funded projects.

C. Project Plan and Timeline (30%)
The scoring criteria of the Project Plan and Timeline section will be:
• Category A: Volunteer Recruitment
  ▪ Specific details on how project plan will be able to attract multicultural individuals.
  ▪ Demonstrated examples (with qualitative and/or quantitative data if possible) as to why volunteers would want to participate in AARP Foundation Tax-Aide program.
  ▪ Demonstrated understanding on how project will be executed and managed and by whom.
  ▪ Clearly stated project challenges with reasonable solutions.
  ▪ Clearly detailed and realistic timeline with key milestones for project implementation.

• Category B: Taxpayer Outreach
  ▪ Specific details on how project plan will be able to reach low- and moderate income multicultural individuals.
  ▪ Demonstrated examples (with qualitative and/or quantitative data if possible) as to the need of target population to access AARP Foundation Tax-Aide program.
  ▪ Demonstrated understanding on how project will be executed and managed and by whom.
  ▪ Clearly stated project challenges with reasonable solutions.
  ▪ Clearly detailed and realistic timeline with key milestones for project implementation.

D. Budget Appropriateness (10%)
The scoring criteria of the Budget Appropriateness section will be:
• Budget line items align with budget narrative.
• Budget proposal reasonable and appropriate to meet program goals.
• Indirect cost not to exceed 10%.

VI. Application Information

A webinar to answer questions about the application and application process will be held on October 27 at 3:00 PM ET. The application components follow.

A. Letter of Intent
All applicants interested in applying for the Multicultural, Multiethnic Volunteer Recruitment and Taxpayer Outreach Initiative grant are strongly encouraged to submit a non-binding Letter of Intent to AARP Foundation by October 31, 2014.

The letter of intent should be submitted to Jackie Lynn Coleman, Program Manager, AARP Foundation Tax-Aide at jcoleman@aarp.org. In the subject line, applicants should write Letter of Intent.

In the body of the email, applicants should list:
• Name of organization
• Address of organization
• Name of authorized representative
• Title of authorized representative
• Email of authorized representative
• Phone of authorized representative
• Geographic area served
• Which category (or both) organizations are interested in applying

B. Application Process

All applicants must complete their application online by November 14, 2014 11:59 PM ET. Organizations will be able to submit their applications by clicking here.

In addition, the applicant should upload the following components when completing the application:

1. 18-month budget utilizing the budget template.
2. Most recent audited financial statements and IRS 990 (if applicable)
3. IRS 501(c) designation

VII. Timeline

Please note several key dates that we expect applicants to be aware when submitting their application.

1) October 27, 2014 (3:00 PM ET): A webinar will be held for interested applicants to review criteria and seek questions about the announcement.

To start or join the webinar on October 27, select the link below:

Multicultural, Multi-ethnic Volunteer Recruitment and Taxpayer Outreach Initiative RFP Webinar

Meeting Number: 742 825 045.

Provide your phone number when you join the meeting to receive a call back. Alternatively, you can call: 1-866-215-3402 with the conference code of 434 360 9.

2) November 18-25, 2014: During this time AARP Foundation will contact finalists to seek application clarification. Institution leaders and project lead should be made available during this time.

3) January 7, 2015 (2:00 PM ET): AARP Foundation will host an on-boarding call for all new grantees to discuss project deliverables and expectations. Individuals responsible for project oversight and grant compliance should attend (as well as others the grantees determine applicable).
Below is the expected timeline for the grant award process.

- October 27, 2014: Webinar for interested applicants
- October 31, 2014: Non-binding letter of intent deadline
- November 14, 2014: Proposal deadline 11:59 PM ET
- November 18, 2014: Finalists contacted with request for clarification
- November 25, 2014: Finalists clarifications period ends
- December 9, 2014: Grantees approved/Grantees notified
- December 12, 2014: Grant award terms and conditions sent to grantees
- January 7, 2015: New grantee on-boarding call (2:00 PM ET)