

**A FEW
POINTS OF
INTEREST:**

- **New**
Volunteers to be paired up with Mentors!
- **Volunteer**
recruitment underway
- **CASH and AARP** help taxpayers during the off season

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NEW AND IMPROVED TRAINING

Training Task Force prepares for new tax season volunteers

The Training Task Force has completed its work and is putting in place exciting new features, including an initial individual Welcome Meeting and the assignment of a Mentor to each new Volunteer tax preparer.

Led by CASH Oregon Volunteer and Outreach Manager Camille McDaniel and Tax-Aide District Coordinators Bill Ensign and Tom Fisher, the group has met seven times since the 2009 tax season. Other participants included Local Coordinators David Kahl and Ralph Leftwich, CASH Board members Scott Collins and Bruce Murray, Amber Earnest and Kathy Howell from the IRS.

The group's work was based on an electronic survey sent to the over 600 people who actually volunteered or expressed an interest in volunteering. Over 200 responses were received,

including more than 100 from people who expressed interest but did not complete the effort. Many respondents took the opportunity to add specific comments to the survey questions. With the information gleaned from the surveys, we were able to make some changes to the Volunteer Training process.

Each individual who responds to our recruiting effort this year will receive a call to schedule a Welcome Meeting with an experienced volunteer who will provide a Welcome Package, discuss the training alternatives and certification process, and answer any initial questions.

After the initial meeting a Mentor will be assigned to each new volunteer. The Mentor will stay in touch throughout the training schedule, will resolve any issues, and work with the volunteer during their initial tax preparation sessions. In addition,



Training Taskforce

prospective volunteers will have access to a practice lab staffed by knowledgeable volunteers.

The Task Force believes this individual focus will smooth out the process and tailor training to each volunteer's needs. Volunteer tax preparers are the backbone of the free tax preparation program, and the key to our ability to serve more people is the quality of each volunteer's experience. These measures will provide much needed support to volunteers and will also help make their time training rewarding and fulfilling.

Volunteer Opportunities!!

September and the Fall Season begins the volunteer recruiting effort of CASH Oregon and AARP Tax-Aide for the 2010 Tax Season. Our most important need is for Volunteer Tax Preparers. The reward for volunteers is the excitement and satisfaction of helping each taxpayer

receive all their tax credits and refunds. No financial background is required -- just the commitment to getting the right number in the right place. We provide free training for this lifetime skill.

Other volunteer opportunities include greeters at selected sites and translators, especially Spanish.

Opportunities for previously certified volunteer tax preparers include interviewers, mentors, practice lab assistants, and classroom assistants.

For more information please email Camille McDaniel at Camille@cashoregon.org, or call 503-243-7765.



2010 Tax Season

*Interested in
volunteering?
Now is a great
time to contact
Camille!*

Taxes in the Off Season

Outside pressures often result in putting off important tasks, especially completing tax returns. With today's Great Recession, the task of filing taxes is an issue that continues throughout the year. Failing to file all returns makes it hard to restore credit and personal economic stability and the cost of hiring a paid preparer is prohibitive.

To help, this year CASH Oregon and Tax-Aide have been operating free tax preparation service one

day per month after April 15. Services are offered primarily at the CASH Lloyd Center office during the off-season. Most all cases involved multiple prior year returns. Under the leadership of Bob Newberry, 90 prior year returns have been prepared to date over the course of four sessions.

All of these returns involve complicated issues, including foreclosures, separated families, and the lack of records. In some cases, the taxpayer did not

know how much state tax had been withheld. The state of Oregon could not tell how much state tax had been withheld for them. As a result, with lost records and a no longer existent employer, the State still believed taxes were owed even though they may have already been paid. This is a situation that happens more often than taxpayers think.

In dealing with more complicated issues, volunteers Barbara Carroll

Continued below...

CASH Welcomes New AmeriCorps VISTA

Diane Williams joined CASH Oregon in August as its newest AmeriCorps VISTA volunteer. Prior to joining CASH, she earned her Bachelors in Sociology and Anthropology and a Masters degree in Writing. Diane has four years of experience in the financial

sector working for private investment firms. She also has five years experience as a writer, using her skills in various tasks ranging from explanations of retirement account regulation to published articles relating to community building. Diane will be working on creating

an individual donor strategy for CASH.



CASH OREGON
in partnership with
AARP TAX-AIDE

Lloyd Center Mall
Suite 2013
Portland, OR 97232

Phone: 503.243.7765
Fax: 503.243.7827
E-mail: info@cashoregon.org



CASH Oregon is a community based non-profit organization formed to improve the financial health of working individuals and families. We promote federal and state Earned Income Tax Credits, provide free tax preparation in partnership with AARP Tax-Aide.

CASH OREGON
Camille McDaniel, Volunteer Coordinator
Diane Williams, AmeriCorps*VISTA

AARP TAX-AIDE
Gwen Williams, State Director
Bill Ensign, District Coordinator
Tom Fisher, District Coordinator

Off Season continued

and Bob took on one case involving returns back to 2002, multiple states, and a Midwest boarding house inheritance and foreclosure. While the case awaits final resolution, Barbara is hopeful that the taxpayer will soon can be able to start again with a clean tax slate. For the taxpayer such a service is a positive, valuable contribution to their financial health, turning a dire situation into an issue with a foreseeable resolution. For this reason, volunteers like Barbara and Bob continue to give their time helping taxpayers.