

# **National Philanthropy Day 2024 Awards Application**

## **Award Category: Outstanding Volunteer Service**

**Nominee: BakerRipley Neighborhood Tax Center Volunteers**

### **1. Leadership Role and Responsibilities**

The BakerRipley Neighborhood Tax Center Volunteers have demonstrated exceptional leadership in providing free, high-quality tax preparation services to low-to-moderate-income individuals and families. The volunteers coordinate and manage multiple tax centers across Houston, ensuring that each location operates efficiently and effectively. Their responsibilities include:

- Supervising tax preparation sessions.
- Providing accurate tax return services.
- Ensuring compliance with IRS guidelines.
- Assisting clients in understanding their tax situations and maximizing their refunds.

### **2. Ability to Organize and Manage Groups**

The success of the Neighborhood Tax Centers is largely due to the volunteers' ability to organize and manage groups of individuals effectively. This includes:

- Recruiting and training 308 volunteers, ensuring they are IRS-certified.
- Scheduling volunteer shifts and managing time slots to meet the high demand for services.
- Coordinating with site managers and ensuring a smooth workflow.
- Implementing a structured system that allows for efficient processing of 36,281 tax returns during the 2024 tax season.

### **3. Time, Effort, and Personal Financial Commitment**

The commitment of the BakerRipley Neighborhood Tax Center Volunteers is reflected in the substantial time and effort they dedicate:

- Contributing 15,788 volunteer hours during the 2024 tax season.
- Many volunteers also incur personal expenses, such as travel and meals, without reimbursement.
- Their dedication saved clients approximately \$8,489,754 in tax preparation fees, significantly enhancing the financial stability of thousands of families.

### **4. Impact of the Service Projects**

The impact of the BakerRipley Neighborhood Tax Center Volunteers' work is profound and far-reaching:

- Prepared tax returns resulting in \$51,442,544 in gross refunds and \$44,088,060 in net refunds for the 2024 tax season.
- Their efforts help low-to-moderate-income families receive the refunds they are entitled to, which can be used for essential needs such as housing, education, and healthcare.
- Strengthened community trust in BakerRipley's services, fostering a sense of financial empowerment among clients.

## **5. Ability to Lead, Motivate, Manage, and Inspire Others**

The volunteers not only lead by example but also inspire their peers and clients through their dedication and expertise:

- Successfully trained and motivated a diverse group of individuals to provide consistent, high-quality service.
- Fostered a collaborative and supportive environment, encouraging teamwork and mutual respect.
- Inspired others to volunteer and give back to the community, significantly increasing volunteer participation year after year.

## **6. Participation in Other Service Projects**

Many of the BakerRipley Neighborhood Tax Center Volunteers also actively participate in other community service projects:

- Engaging in disaster recovery efforts, providing essential support to those affected by natural disasters.
- Volunteering at food distribution events, ensuring families in need have access to nutritious meals.
- Participating in community outreach programs, spreading awareness about available services and resources.

## **Conclusion**

The BakerRipley Neighborhood Tax Center Volunteers exemplify outstanding volunteer service through their exceptional leadership, organizational skills, and unwavering commitment to their community. Their efforts have significantly impacted the financial well-being of thousands of families, making them deserving recipients of the Outstanding Volunteer Service Award. Their dedication and passion for service inspire others to join in their mission, creating a ripple effect of positive change throughout Houston.



# CHINESE COMMUNITY CENTER 中華文化服務中心

May 31, 2024

To Whom It May Concern,

It is with great pleasure that I write this letter to recommend the BakerRipley Tax Center Volunteers for recognition of the National Philanthropy Day Outstanding Volunteer Service Award. As the Financial Opportunity Center Director at the Chinese Community Center, I have had the distinct privilege of witnessing firsthand the remarkable dedication and impact these volunteers have on our community.

The impact of the BakerRipley Tax Center Volunteers on the community cannot be overstated. Their commitment to providing free, high-quality tax preparation services has a profound effect on the lives of thousands of individuals and families. During the most recent tax season, volunteers have helped prepare over 36,000 tax returns, resulting in more than \$51 million in refunds for our clients. This financial support is vital, particularly for low-income households who rely on these refunds for essential expenses.

Furthermore, the volunteers' work helps to alleviate the stress and confusion that often accompanies tax season. By offering their expertise and support, they empower clients to navigate the complexities of tax filing with confidence. This service not only provides immediate financial benefits but also contributes to the long-term financial stability of the community.

I am incredibly proud of the dedication shown by the BakerRipley Tax Center Volunteers. Their unwavering commitment to helping others reflects the core values of BakerRipley and has a lasting positive impact on our community. I wholeheartedly recommend them for any recognition or awards they may be considered for, as their service is truly exemplary.

Thank you for considering this recommendation.

Sincerely,

**Nhi Truong**  
Financial Opportunity Center Director



Greater Houston

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Volunteering with the BakerRipley Tax Center is a significant commitment that requires a substantial investment of time and effort. Each of our volunteers embarks on a journey that begins with a thorough orientation and extensive training process, ensuring they are fully prepared to serve our community effectively.

The first step for all new volunteers is a one-hour orientation designed to introduce them to BakerRipley's mission and operations. This crucial step provides an understanding of the agency and sets the stage for the more intensive training that follows. The mandatory training for all new volunteers is comprehensive and rigorous, reflecting the high standards we uphold in our services.

Most volunteers opt for the in-person training, which spans 12-16 hours. Volunteers can choose between two options: a two-day intensive course, or a series of three evening classes. These options accommodate the varied schedules of our volunteers, many of whom are full-time employees or students. For those who prefer a more flexible schedule, we offer an online training program that can take as little as 12 hours, but typically requires about 20 hours due to its self-paced nature.

After completing their initial training, volunteers must pass a series of certification exams. The Standards of Conduct and Intake/Interview and Quality Review exams ensure that all volunteers understand the program's guidelines and ethical standards. Those who wish to assist with tax preparation must also pass the Advanced Tax Prep Exam, a challenging test that involves completing tax returns and answering detailed questions about them.

The certification process alone can take several days, with volunteers often splitting their exam time to manage the complex and detailed questions. This rigorous preparation is essential for ensuring that our volunteers are equipped with the knowledge and skills necessary to provide high-quality service to our clients.

Once certified, volunteers begin their hands-on work at the tax center, where they continue to learn and refine their skills on the job. This practical experience is invaluable and further enhances their ability to assist clients effectively. The commitment of our volunteers extends far beyond their initial training. Many contribute hundreds of hours each tax season, with some individuals donating over 500 hours of their time this year alone.

We are incredibly proud of our volunteers and their unwavering commitment to our cause. Their dedication not only supports our mission but also transforms lives, one tax return at a time.

