

Installation of Virtual Local Area Network for Menomonie AARP Tax-Aide Site

August 2026 Community Impact Grant Cycle

AARP Tax-Aide Menomonie Site

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Application Form

Instructions

INSTRUCTIONS

Complete the grant application by responding to the fields below. Note that any fields with an asterisk are required fields and must be completed prior to submitting an application.

As you complete the form, the system will auto-save every 100 characters typed or every time you click out of a field. You may collapse question groups as you go, as an indicator to yourself that you've completed that section and to reduce scrolling.

The system also allows you to Save an application and come back to it before submitting. There is also a Collaborator feature that allows applicants to work together on a single request. https://docs.google.com/document/d/15NsdFgi3lBmBu0_pp1zj2HZ51l4mx8Wryjrx4FYOmdg/edit?usp=sharing Click here to learn about the collaborator feature. Contact the Community Foundation at (715) 232-8019 if you have any questions or problems with the form.

Request Overview

Project Title*

Please provide a descriptive Name/Title for this grant request.

Installation of Virtual Local Area Network for Menomonie AARP Tax-Aide Site

Amount Requested*

Typical grant amounts range from \$500 to \$5,000 or more.

\$200.00

Program Area*

Please check the program area that best categorizes this grant request.

Human Services

Geographic Area Served*

Please select which geographic area is primarily being served by this request.

Dunn County wide

Does your organization function within Dunn County?*

Yes

Population Served*

Please select the specific population being served by this request. You can select age and income level in the next section. If the population this grant targets is not listed, please choose "General".

General

Age Group Served*

Please select the specific age group served by this grant request.

Senior Citizens

Income Level Served*

Please select the income level of the target population being served by this request.

Low Income

Non Discrimination Policy*

In accordance with federal regulations, the Community Foundation of Dunn County does not discriminate based on race, color, creed, sex, religion, age, disability, sexual orientation, marital status or national origin. Do the applicant organization's employment and service practices comply with this policy?

Yes

About Your Organization

1. Organization Overview*

Please provide a brief background about your organization, including a short summary of the organization's history, mission, goals, accomplishments, and challenges.

This request is from the Menomonie (Dunn County) Site of the AARP Tax-Aide program. Tax-Aide is the AARP sponsored arm of the nation-wide TCE program, an IRS-supported initiative that provides free tax return preparation to individuals. The program's services are open to all demographics, being especially receptive to senior citizens and low-income individuals. The TCE program is run through cooperative agreements between the IRS and eligible organizations, which manage volunteer recruitment, training, and site operation. Volunteers are IRS-certified and often retired individuals who are trained annually to stay current with tax law changes. In addition to the IRS association the State of Wisconsin Tax-Aide program (of which Dunn County is a chapter) works closely with the Wisconsin Department of Revenue.

The Tax-Aide Dunn County site has been operating in the community for over 20 years. Each tax season, approximately early February through April 15th, volunteers prepare and file Federal and State tax returns of community members. During the recent tax season our team filed returns for over 350 couples/individuals.

I might note here that the Menomonie Site is making this funding request after first exploring funding options available through AARP. Although AARP provides substantial program support through coordination, training, and some equipment (computers, printers, paper supplies), funding was not available for site-specific costs.

2. Current Initiatives*

Please describe your current programs, activities, community impact and the community's involvement or support of your organization.

The Dunn County Site Tax-Aide program meets with clients each spring to file tax returns. Preparation and filing are free. This program benefits community members in that it assists their compliance with the legal obligation to file both Federal and State tax returns, assists them in navigating the complexity of the modern tax landscape, and assists our clients economically - relieving them of the cost of a privately prepared tax return. This program, in that it assists taxpayers in securing tax refunds, returns a substantial amount of income to the community.

The Tax-Aide program is available to all although we have a special focus on senior and low-income community members.

3. Organizational Structure*

Describe the current structure of your organization, including how the organization functions on a daily basis. (CEO, staff, volunteers, etc.)

The Tax-Aide program is entirely volunteer administered. The broad scope of the TCE (Tax Counseling for the Elderly) program is structured by the Federal IRS, outlining objectives, standards, and training. The TCE program works through cooperative agencies, of which the AARP is the largest and the agency the Dunn County Site is associated with. Local sites interact with the state Tax-Aide administrators largely through standards compliance, recruitment of volunteers, and training. In many ways, especially as relates to site operations and integration with the community, local sites operate independently. Key to this request; that includes site location. As far as CEO and other hierarchy, that exists at the regional and state level but that level's participation would be in the area of compliance, standards, and training. Local sites are largely operationally independent. Local site operation is entirely volunteer staffed.

About the Grant

What is the community need that this request addresses?*

The Dunn County Tax-Aide Site must have a community location at which to meet our clients. This site must have internet connectivity in order to complete and file tax returns. This connection must be secure in order to protect taxpayer's personal information. The VLAN that this request would fund will provide the connectivity and security necessary to function in a new meeting site we propose to use beginning in 2027.

Background. During the previous six years, Dunn County Tax-Aide operated in the Dunn County Government Center. That relationship offered the space, internet connectivity, and security needed. Our local Site Coordinator, was advised earlier this year that space would no longer be available in the Dunn County Government Center. A search of local meeting site options did not identify anything available that met the program's needs (our practice has been to operate for two full days per week for the almost three-month tax season). Subsequently, Compass Independent Living offered an ideal meeting space.

An aspect of the Compass IL meeting site that needs to be addressed is network security. This is true for both Compass and Tax-Aide. We both have an obligation to ensure the privacy and security of our client's personal information and neither group's staff is vetted to access the other's data. The remedy is to install a Virtual Local Area Network within the Compass network. The VLAN provides separate, fire-walled, access to each entity, protecting each organization's data. Without this separation of function, we do not have a serviceable meeting room and without a meeting location the Dunn County Tax-Aide program cannot continue to serve the community.

Tax-Aide's volunteers reached out to West Wisconsin Telecomm, Compass's IT provider and learned that West Wisconsin can install a VLAN at a cost of \$200.

Project Goals and Activities*

Describe the specific goals and activities of your project and how they will be carried out or accomplished.

Install a Virtual Local Area Network within the Compass Independent Living networks that will offer Tax-Aide internet connectivity and securely separate access between Compass and Tax-Aide.

Pending funding, West Wisconsin Telecomm will be contracted to install the VLAN.

Project Outcomes*

Describe the anticipated outcomes resulting from this grant project, its impact and how the community will be better served.

The installation of the VLAN at Compass Independent Living will enable Dunn County Tax-Aide to use the Compass meeting room. Access to this meeting location will allow the Tax-Aide program to continue to function within the Menomonie and Dunn County community. Many community members who would find it financially challenging to pay a private tax preparer and are ill-equipped to file a return on their own will be well served by the continued operation of a local site.

Anticipated Challenges*

Describe any anticipated challenges and how you will meet them.

None

Sustainability*

Please describe how you will fund and continue to sustain these activities beyond the grant period.

The VLAN installation is a one-time cost, and the operation of the Menomonie Tax-Aide site is entirely volunteer staffed. I do not foresee ongoing future costs.

Staff - Project Summary*

Tax-Aide files tax returns for free for the areas senior citizens and those with low income (although open to all). They previously housed this volunteer operated project in the County building, but were informed they could no longer do so. They have created a partnership with Compass Independent Living for a space to work from, but now need to secure the internet. Filing taxes can only happen with secure internet.

Grant Project Budget

Anticipated Project Income*

Please list out all anticipated sources of income for this specific grant project with amounts and whether the funding is approved or pending.

Ex: Dunn Energy Cooperative: \$1,000 - Approved

This project will not generate income.

Total Project Expenses*

What are the total expenses for this particular grant project? This may be more than your grant request amount and helps us to understand if the Foundation is funding a portion of the project or the full cost of the project.

\$200.00

Project Expenses Description*

Please itemize the expenses for this grant project, including a short description of each item and the anticipated cost. (Personnel, Materials and Supplies, etc.) If this grant is to cover a portion of the project, please list all expenses of the project and then specify which expenses you anticipate being supported by this CFDC grant.

Installation of a Virtual Local Area Network within the Compass Independent Living network @ \$200.

Project Budget Upload

(Optional) You may upload a separate file of your own, representing this grant request's Project Budget. For help creating the document, you can click here to download our Grant Project Budget template.

Letter of Support

(Optional) Letters of Support are optional, unless another organization or individual is integral to the purchase or use of the program and/or is a fiscal sponsor. Then it is required.

Additional Supporting Documents

(Optional) You may upload additional supporting documents to your request. If this grant request is to purchase a specific item or equipment, please upload a financial quote or spec sheet about the item here.

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Staff - Project Budget Summary*

Brief sentence about how the grant budget is broken down by item.

Installation of a Virtual Local Area Network within the Compass Independent Living network @ \$200.

Required Organization Financials

Current Board of Directors*

Please upload a list of your organization's current Board of Directors.

BOD doc.odt

Organizational Budget*

Please upload your organization's most recent Operating Budget with projected revenues and expenses.

Budget doc.odt

Audited Financials

Please upload a copy of your organization's current Audited Financial Statement, if you are required to file.

Audit Opt-Out

Under Wis. Stat. § 202.12 | a charitable organization with annual contributions over \$500,000 must file an audited financial statement and include the opinion of an independent CPA. A charitable organization with annual contributions less than \$500,000 and over \$300,000 must file a financial statement reviewed by an independent CPA. If you do not upload an audit or financial statement, please verify that your organization is not required to based on this state statute.

Our organization is not required to file an audited financial statement

Proof of 990 Filing*

Please upload proof of current IRS 990 Filing. You may upload the first page only; the full 990 document is not required.

990 Filing.odt

Authorization

Applicant Agreement*

As the applicant submitting this request on behalf of the organization, you certify that:

- The information provided in this application is complete and accurate to the best of your knowledge.
- Falsification of information will result in termination of any award granted.
- You have discussed this project and grant request with the necessary authorized representatives at your organization. They support this request and the proposed allocation of funding.

If awarded a grant, the organization will:

- Carry out the activities and expend grant funds as described in the proposal, to the best of their ability.
- Submit significant changes in the scope or budget of the project to the Foundation for approval.
- Complete and submit written reports as required no later than 12 months from the date the grant is awarded.
- Acknowledge the role of the Community Foundation of Dunn County in supporting the organization in communications with their board and the public.
- Provide copies of all publicity, press releases or promotional materials. If available, provide photos in digital format.

I agree

File Attachment Summary

Applicant File Uploads

- BOD doc.odt
- Budget doc.odt
- 990 Filing.odt

Menomonie Tax-Aide site submission

Board of Directors

The Menomonie Tax-Aide site does not have a Board of Directors

Menomonie Tax-Aide site submission

Organizational Budget

The Menomonie Tax-Aide site does not have a budget

Menomonie Tax-Aide site submission

Proof of 990 Filing

No 990 Filing