



**From:** [Gillcrese Valerie D](#)  
**To:** [ED, State Board of Ed](#)  
**Cc:** [laura.yohe@ja.org](mailto:laura.yohe@ja.org)  
**Subject:** [External] State Board of Education's Proposed Rulemaking regarding Academic Standards for Personal Finance  
**Date:** Tuesday, June 18, 2024 11:48:35 AM  
**Attachments:** [image001.png](#)  
[image002.png](#)  
[image003.png](#)

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Good afternoon,

My name is Valerie Gillcrese, and I am a Senior Stakeholder Partnership Relationship Manager for IRS' Stakeholder Partnerships, Education & Communication (SPEC) division. Our mission at SPEC is to assist taxpayers in satisfying their tax responsibilities by building and maintaining partnerships with key stakeholders, seeking to create and share value by informing, educating, and communicating with our shared customers.

SPEC accomplishes its mission using a three-pronged approach: tax preparation, tax education, and financial education and asset building. SPECs primary focus is on aiding low-income taxpayers, the elderly and/or disabled, and limited-English speaking individuals. It is our responsibility to manage IRS' Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs. Last year, our volunteers prepared over 2.5 million federal tax returns and over 1.5 million state tax returns.

We currently partner with several schools, colleges, and universities to provide these services. We provide our partners with the resources that enable them to empower their students while saving their communities hundreds of dollars. Some of our partners include Cedar Crest HS, Clarks Summit University, Penn State DuBois, Lackawanna College, Dallastown HS, Central Valley HS, Pine Grove HS, Tunkhannock Area HS, and Mount Aloysius College - to name a few.

Senate Bill 843 mandates schools to develop a standalone personal finance course for high school students. I believe Pennsylvania high schools should be encouraged to sponsor a volunteer income tax assistance site because it will assist them in meeting the bill's objective. Partnering with IRS' VITA program will promote compliance by giving the students the opportunity to learn about

taxation. Furthermore, it will provide students with community service opportunities and enable them to provide a valuable service to their communities.

If you are interested in learning more about how a partnership with my organization can benefit the PA State Board of Education's proposals for personal finance academic standards, please let me know and we can schedule a time for us to meet.

Best regards,



**Valerie D Gillcrese**

**Senior Stakeholder Relationship Tax Consultant**

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TOD: 7:00 AM to 3:30 PM M-F

Growth Group 207 (NY, ME, NH, VT, MA, PA, RI, & CT)

English     

Spanish   

Want to help your community by opening a VITA/TCE site? [Become a VITA partner](#)  
Partner and volunteer Resource Center link: [Partner-and-Volunteer-Resource-Center](#)