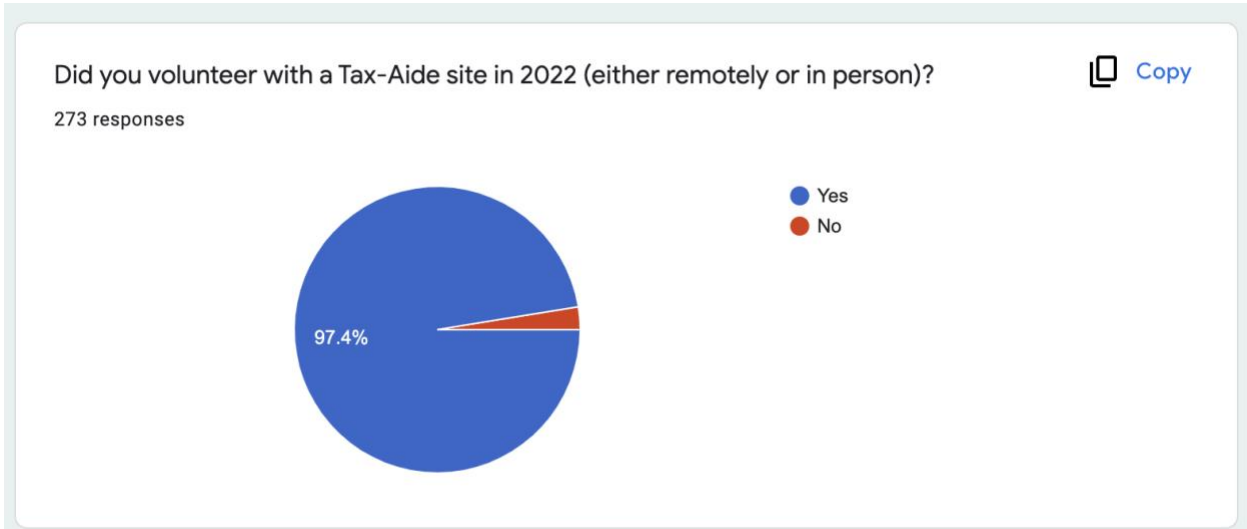


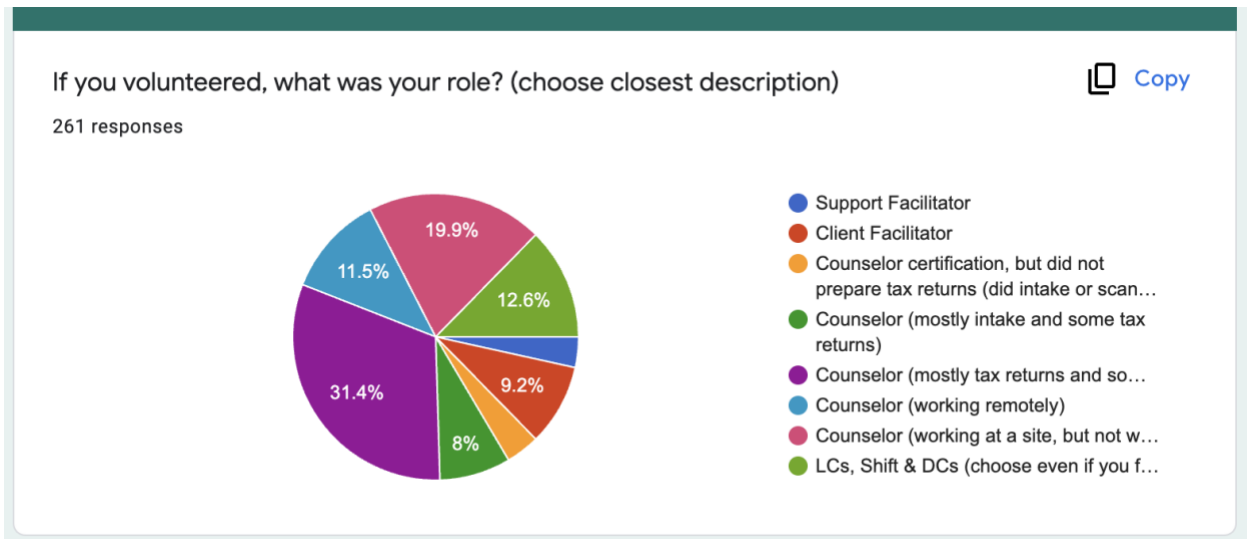
# AZ Tax-Aide TY21 Survey Summary

As of May 1, we received 273 of the 786 AZ Tax-Aide surveys that were initially emailed to our volunteers, which represents about a 35% response rate; following is a summary.



**#1.** Responses to this question show our membership log is within 3 percentage points of being up-to-date, as only 7 respondents said they had not volunteered in 2022. One said they had moved out of state, two cited the vaccine mandate as a hurdle, and another used it as an excuse to respond with a political statement.

## Volunteer Section:

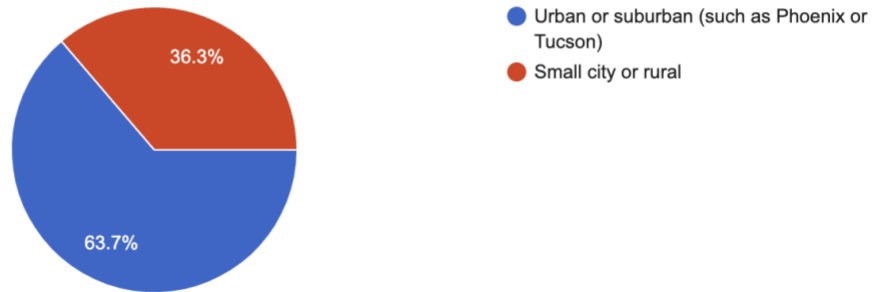


**#2.** Self explanatory

Was your home site urban or rural?

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262 responses

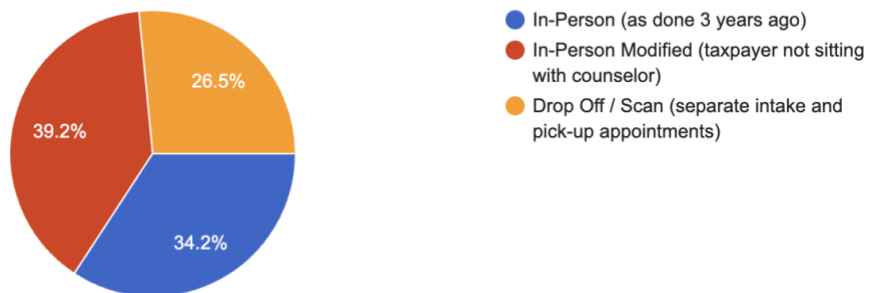


### #3. Self explanatory

Which service model would you be most comfortable using for next year?

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260 responses

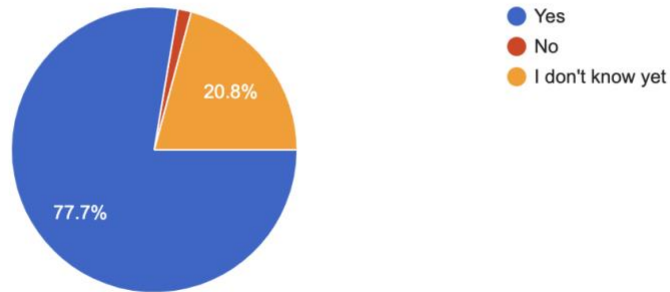


**#4.** Definitely the majority of our volunteers want to be in some type of contact with the taxpayers next year. The question about the In-Person Modified will need to be looked at more closely and better defined.

Do you anticipate volunteering for Tax-Aide next tax season?

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264 responses

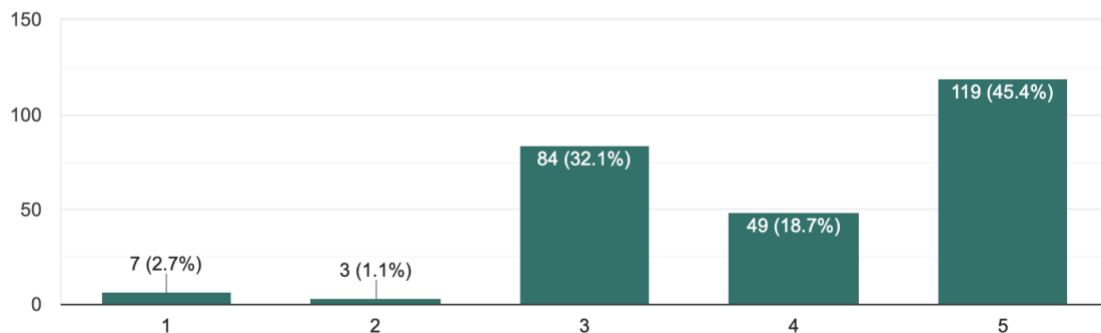


**#5.** The respondents overwhelmingly anticipate volunteering next year, with only 1.5% saying no, along with the 21% who have not decided yet. The four who did volunteer in TY21, but stated they would not in TY22, were uncomfortable with Chromebooks in addition to a personality complaint or two.

How do you anticipate volunteering next tax season?

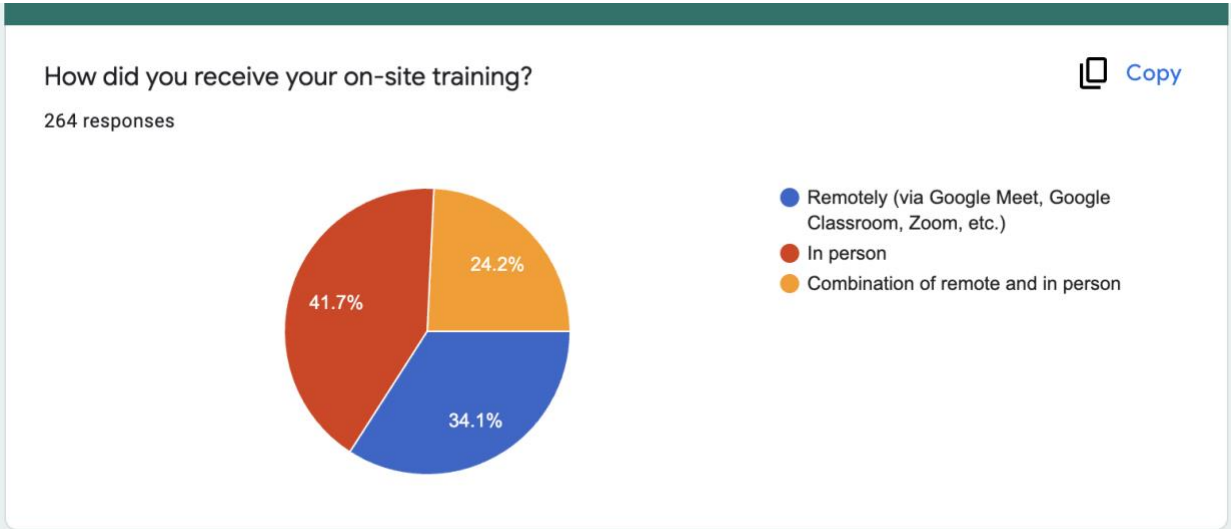
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262 responses

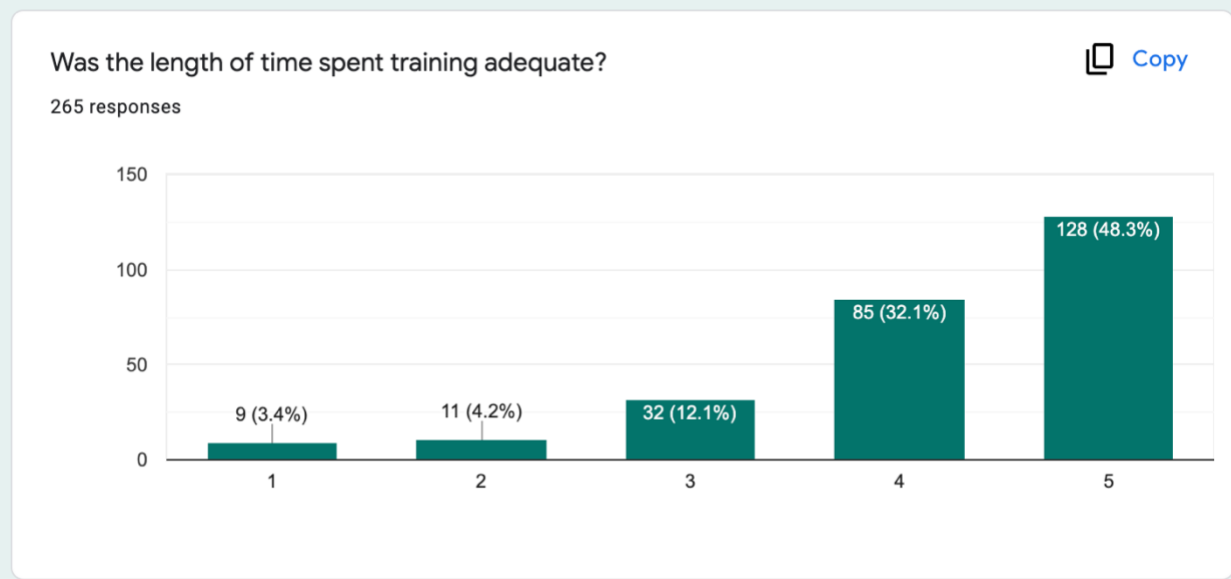


**#6.** This question was a linear choice ranging from '1' being "I will only volunteer remotely" to '5' being "I will only volunteer in person." There's an obvious tilt to in person. We should look more closely at the 4% answering remote-only to this question, versus the 26% that indicated a preference to working remotely in previous question #4.

## Training Section:



**#7.** While the biggest share received in-person training, the responses also indicate an acceptance of technological and remote training, as represented by over 50% with experience in some type of long-distance training.

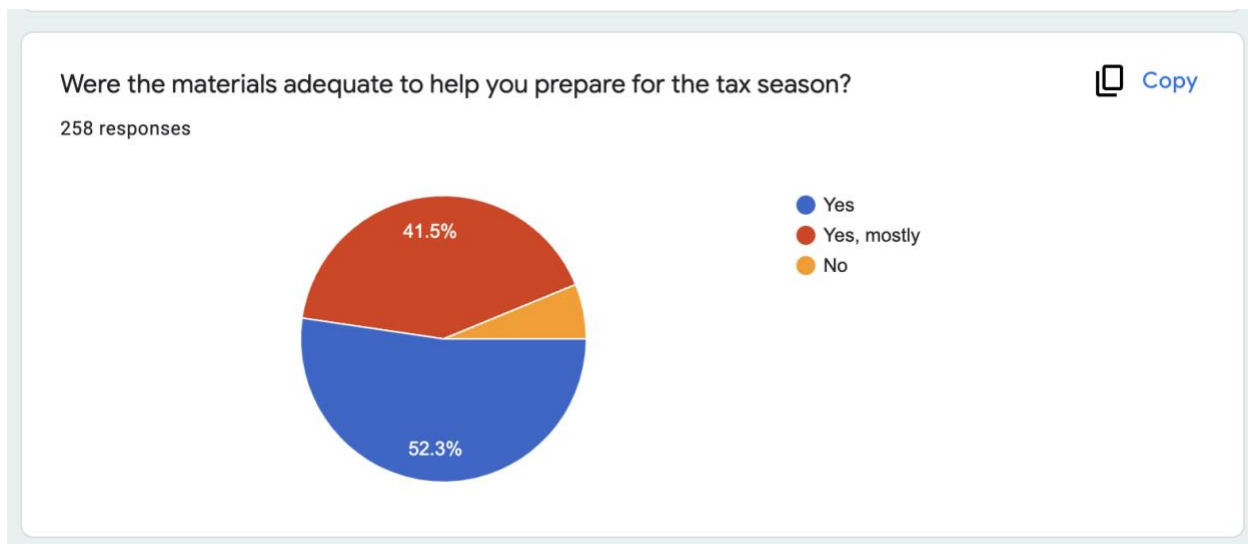


**#8.** This question was a linear choice ranging from ‘1’ being “Wholly inadequate” to ‘5’ being “Completely adequate.” Our volunteers are clearly not asking for more time to be added to the training schedule. The problem to solve will be how do we get them the enhanced information they want to know without increasing the training hours?

**#9.** About how many hours did you spend preparing for the tax season outside of the formal training sessions?

This question was perhaps worded a bit too open-ended, as some responded by asking what “formal training” meant, but to loosely group the responses, they broke down as:

- 73 answered 0 to 10 hours
- 51 answered 11 to 20 hours
- 27 answered 21 to 30 hours
- 30 answered 31 to 40 hours
- 25 answered 41 to 99 hours
- 5 answered 100 or above, with the highest number given as 1,650
- 33 answered with words and no numbers, “a lot” or “too many,” for example (The slightly concerning ones were the 7 that answered “None” or “Zero, as I’ve been doing this for years.”)



## #10. Self explanatory

## #11. How could your training be improved?

The crystal-clear response to this question is for more Arizona tax law training, with tax credits mentioned often. After that, the responses split apart into many minor issues: train more or train less, no training on obscure tax law, give us hard copies, use more videos for training, more TaxSlayer and/or Chromebook training, etc.

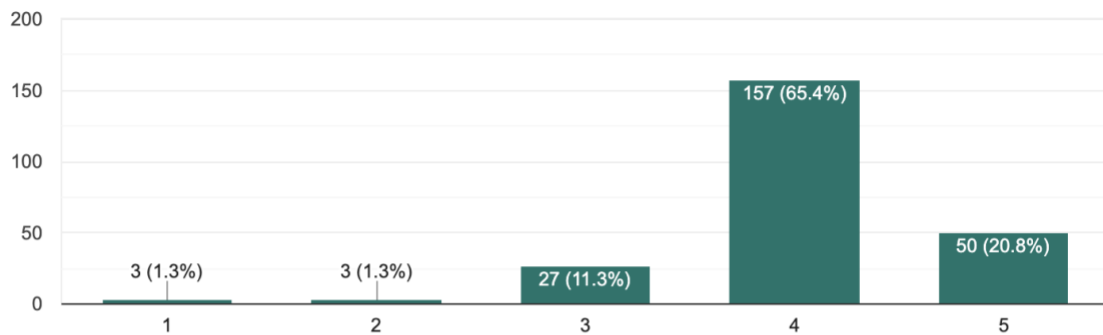
### Sample responses:

- *More on AZ credits and best way to deal with previous year carry forward*
- *HSA, child care expenses, and AZ tax credits include more handouts.*
- *You tube type videos which are fun as well as informative.*
- *By including sample problems preparing an Arizona income tax return.*
- *The trainer assumed too much prior knowledge*
- *The training was mostly about using the software -- more tax law training.*
- *Let's get multiple sites together for more group training.*
- *AZ state returns had a lot of things different than fed that were confusing*

Were you adequately trained to prepare an accurate Federal tax return?

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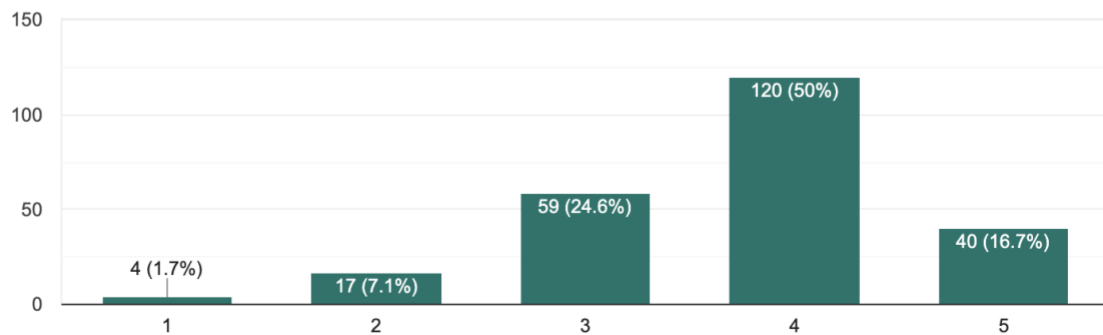
240 responses



Were you adequately trained to prepare an accurate Arizona tax return?

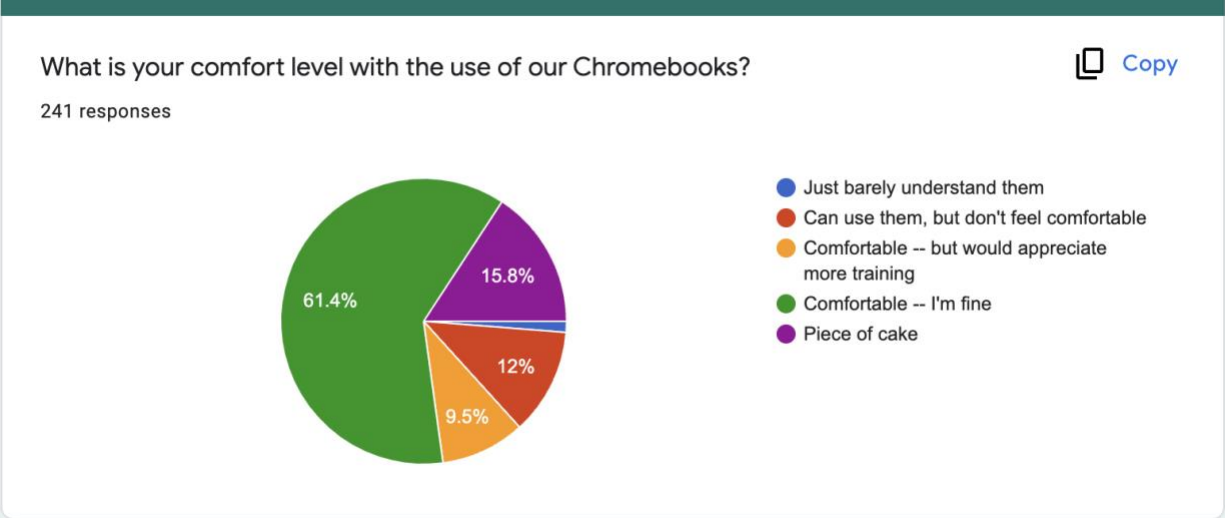
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240 responses

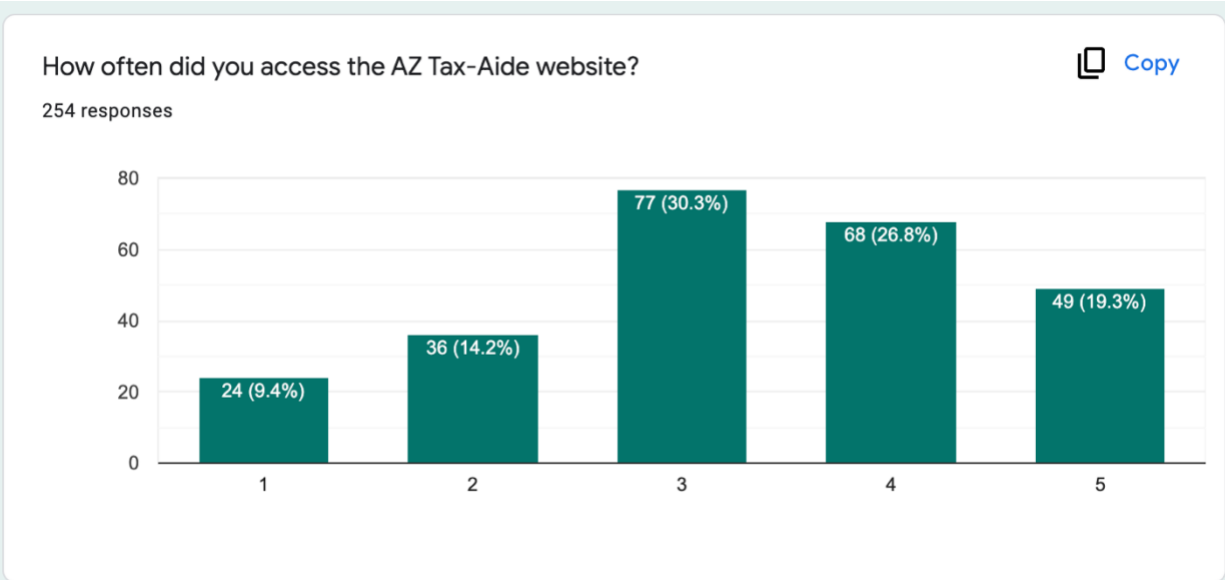


**#12. & #13. This question was a linear choice ranging from '1' being "I could barely figure it out," to '5' being "I know everything."**

The fact that the bottom two categories are limited to single digits shows a solid base of knowledge overall for our volunteers. But it is also strongly evident that we have focused on Federal returns at the expense of AZ returns.



**#14.** Having a 76% showing of comfort using the Chromebooks is great, but we still need to shore up those who aren't understanding them.

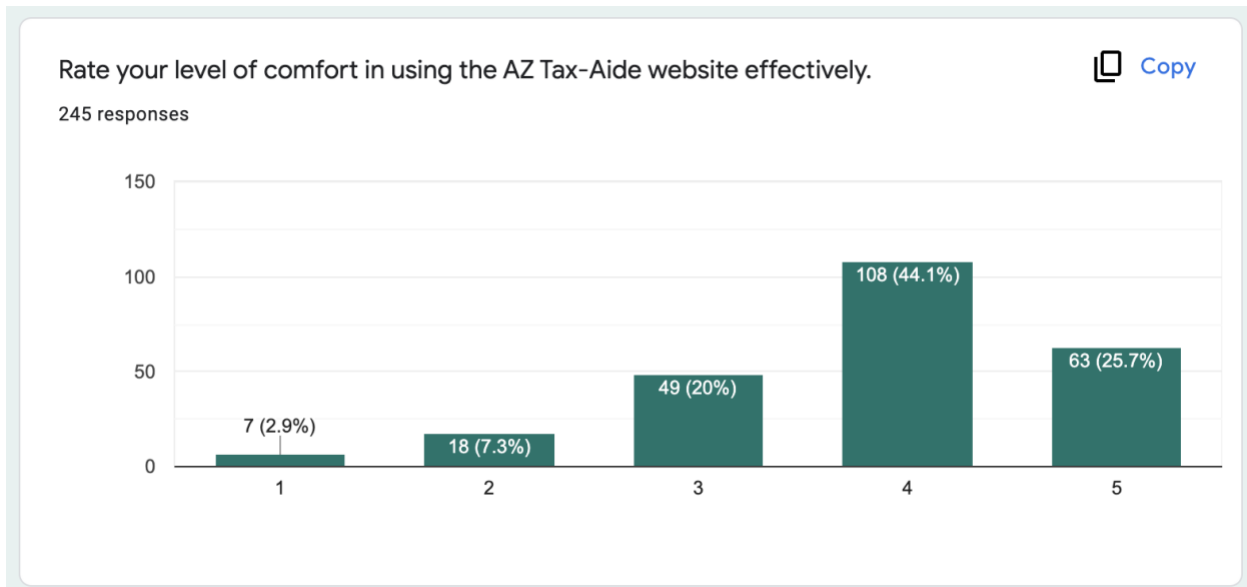


**#15.** This question was a linear choice ranging from '1' being "Never" to '5' being "Daily."

Since the middle timing intervals weren't very well defined, this question is a bit open to interpretation, but it seems logical to think this means about 75% of volunteers use the AZ website at least once a week and some more. This is another area to work on getting the word out to our volunteers about where to find Tax-Aide information.

**#16.** "What subjects or links did you most often seek out when using the AZ Tax-Aide website?"

The hands-down winning answer for this question was the AZ page of the website, with the qualifying charities, the property tax credit and accessor links all mentioned prominently, followed closely by access to Bogart and the Pub 4012 links.



**#17. This question was a linear choice ranging from ‘1’ being “I’ve never figured it out” to ‘5’ being “It’s easy.”**

It’s great that less than 10% struggle with using the website, but how do we improve communications to let volunteers know about the information that is at their fingertips?

**#18. What one thing could the AZ state management team do to improve your Tax-Aide experience?”**

There were fair number of compliments. The largest group of complaints was training related – wanting both more and less, in addition to help with more AZ tax knowledge. The next largest group of complaints was about paperwork, including many about the IRS intake forms and redundancies. After that came technology complaints, site-related comments, management, communication and miscellaneous. Details follow:

**Sample responses:**

**Positive –**

- *I felt prepared and comfortable on day one seeing clients. Good job.*
- *Nothing. It was totally organized at my site. It was amazing! Great job*

#### **Training related –**

- *More and better training on AZ specific taxes*
- *I'd do an extra day of training to be more competent with preparing AZ returns*
- *Additional training*
- *Shorten training*
- *Hold longer training sessions with several sites in attendance in the Phoenix*
- *Your training is excellent. It is up to each volunteer to invest their time to learn.*
- *make sure that everybody knows & try to emphasize use of marked up 4012*
- *Maybe have a special training session for Chromebook.*

#### **Paperwork related –**

- *Simplify the intake form and get rid of the questions*
- *I should only have to answer “no spouse” once.*
- *Assure clients bring intake documents completely prepared*
- *More formal intake protocols so that every intake counselor does it the same way*

#### **Technology related –**

- *Provide more Chromebooks so all volunteers have access and not sharing*
- *Setup all ChromeBooks with links shown in the header line*
- *Never could figure out why I couldn't sign in this year.*
- *Make website friendly for appts so less walk ins*

#### **Site related –**

- *Return to in-person service as soon as possible.*
- *Continue client appointment drop off service model.*
- *Have the client sit with the tax preparer - Then there are no surprises after completion - the client would be part of the preparation process.*
- *Have the same rules for all sites*
- *A lead person that only answers questions for all other workers*
- *Figure out a way for all taxpayers to come to the tax site with their intake booklet completed.*