

# TY21 Arizona Tax-Aide LC Survey

June

Thanks to the Local Coordinators who contributed to the TY21 survey. This was a year unlike any other. Pandemic restrictions required us to turn to entirely new – and largely untested – delivery models to prepare taxes and make appointments. The State Team thanks all of you and your dedicated fellow volunteers for the work you put into this accomplishment.

The high-level summary from the survey was that, despite the distractions, most LCs were able to move forward with a system that worked, even if they didn't love it.

The survey reveals that LCs have an in-depth understanding of their individual sites and their clientele. We hope to build on that local knowledge, while maintaining IRS and National standards in TY21.

Additional general highlights would be that Session Management was criticized; more sites used the drop-off model than the scan model; more training on Arizona taxes was requested; and across the board, everyone was frustrated by the never-ending changes.

Despite all difficulties, almost 75% of the LCs chose 'very' or 'very much' when asked how successful they felt about TY21, considering the inherent difficulties of this year.

The statistics are based on 31 out of 44 Local Coordinators managing Arizona's 52 sites in TY21.

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## Appointments:

Client satisfaction with the appointments was often linked to what the past practice had been at each respective site. Clients whose regular site had previously done only walk-ins, expressed a lot of satisfaction with a shorter wait time, but the same was not true at sites where setting appointments had been the previous norm.

A third of sites used a Google Voice phone number to make appointments. The next two most used ways to make appointments were with the Setmore software, or with volunteers returning phone calls after the site host and/or machine had taken the initial phone call. (Session Management software had few fans.)

There were at least 3 other appointment software programs that were used in the state. No matter what system the LC chose, he/she was fairly satisfied with it, as over 50% chose 'very' or 'very much' satisfied.

Representative responses about appointments:

- *Appointments had some benefits, but making appointments was very labor intensive and Session Management very cumbersome to use.*

- *Having never used an appointment system before, our clients were very enthusiastic. Most heard comment: "Better than first come first served!"*
- *For some taxpayers it would work well in the future, others not so much.*
- *Site Volunteer took phone calls [but] Volunteer would not do it again*
- *Frustration*
- *It sort-of worked. Many clients were reluctant to answer calls from an unknown number. Clients did not know when they would get a call back.*
- *We need a phone number that shows up as AARP Taxes when we call people.*
- *It was hard to locate on-line, even for some experienced computer users*
- *They liked the follow-up. We had always been a walk-in site and they liked having a specific appointment time.*

### **Delivery Model:**

Over 61% of sites marked drop-off as their delivery model, while 16% marked scanning. The remainder used some hybrid or modified version of the models. Regardless of which delivery model was chosen, about 50% were mostly satisfied (selecting a 4 out of 5) with what they produced.

LCs were split 50/50 in response to using either scanning or drop-off delivery models in the future – with some sounding passionate on either side.

Representative responses about delivery models:

- *It was good that counselors could work at their own pace and were uninterrupted*
- *We spent too little time with the TP and couldn't ask them questions as we went through the return.*
- *The Intake process [was the best part]; having a competent person know what questions to ask tax client*
- *Not having clients allowed for a free collaboration amongst the counselors*
- *The clients loved it because they weren't sitting around for several hours while returns were being QR'd and printed. The counselors for the most part prefer face-to-face, so they didn't have to make so many phone calls.*
- *We were able to serve taxpayers even though the system was cumbersome*

### **Training:**

About 68% reported using a mixture of platforms to accomplish training, followed with 26% using only Virtual Training (Google Meet). About 50% felt their site team earned 4 out of 5 points for being adequately trained, with about 25% each choosing either 3 or 5. Only 3% chose less than 3 points.

There are many requests for a return to in-person training. While we hope Districts can return to in-person training, the pandemic level is a consideration. Portions of future training and certification will continue to have computer-based resources and certification components. We

know that adding AARP LMS training courses to Link and Learn and NTTC requirements was confusing.

There were multiple requests for more in-depth training in different areas of Arizona taxes, specifically AZ Tax Credits including Property Tax Credits.

Difficulty accessing and using the portal were reported in some areas.

Representative responses about training:

- *Having all the required training in one place would have simplified the process.*
- *Would have liked more time for state tax training but were swamped with all the changes due to Covid and they were confusing.*
- *Using the portal*
- *[For training:] Emailed, Google Meet, and individual contact by phone*
- *We always used hybrid [for training] since we all learn at our own pace and start at different levels. Because we are so remote, few volunteers would agree to classroom learning if distant learning/hybrid is an option.*
- *Having training through Link and Learn and then the Portal just confused everything.*
- *All my people stated they would have been better prepared if we had done in person training.*

### **Management:**

Representative responses to “What more could management have done”?

- *Monthly conference calls and more clarity regarding mid-year changes*
- *The state level communication could be shorter and to the point*
- *Help LC learn computer.*
- *Our DC and State Team were very responsive and kept us up to date as much and as quickly as they had the information.*
- *Better training regarding the technology.*
- *LCs need to be able to meet with state team and get to know them.*
- *I am not sure they could have done more. It seemed the lack of information from the National level and from the Federal level was most lacking.*
- *State Team being more patient with understanding all the new procedures.*
- *Understanding each DC’s particular audience.*

### **Additional Comments:**

Representative responses to “any additional comments”:

- *Our volunteers were extremely flexible and rose to the occasion. The drop-off model allowed some of our very experienced volunteers who have medical issues themselves to be able to participate in preparing and/or reviewing returns at home. They were happy to be able to continue helping.*
- *National requirements (LMS) and other ever-changing requirements were distracting*

- *I would have benefited from more discussions with other LCs on a regular basis*
- *It has been a trying couple of years and I'm thankful to all those that hung in there*
- *One of the most difficult issues had to do with Congress changing tax laws in both December and March; that made helping taxpayers much more complex.*
- *AARP spent too much effort creating other methods of doing taxes and imposing restrictions instead of offering guidance & safeguards.*
- *The consistent positive this tax season was the volunteers. Everyone who volunteered this year really excelled in flexibility, number of hours worked and commitment to producing a quality tax return.*

*The snapshot in time this survey represents is a valuable tool. Your state management team and district coordinators will continue to look for solutions and improvements as we move into TY22. We welcome your input."*