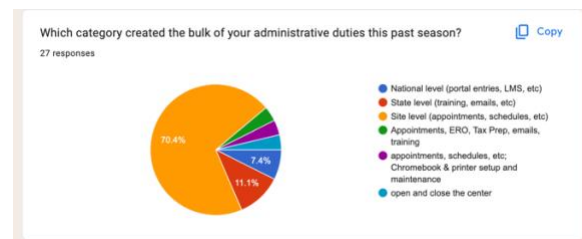
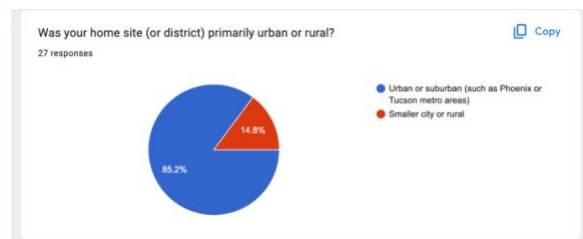
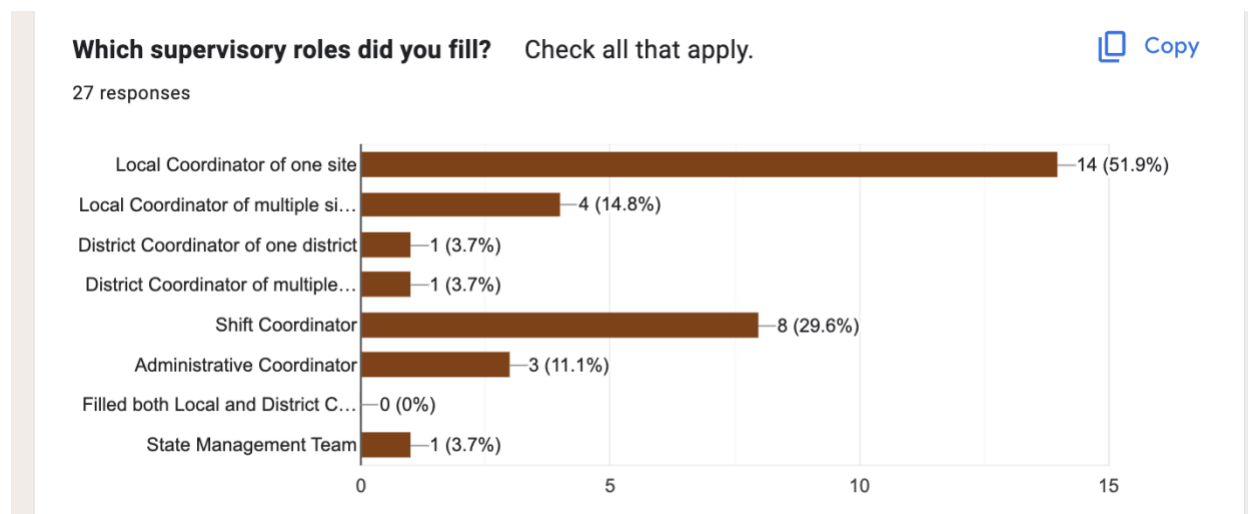


TY22 Leadership Survey Summary

In June, 2023, short surveys were sent to both first-year Tax-Aide and to volunteers in leadership positions asking for input about their positions. The results show us that our volunteers continue to have many questions about AZ returns and leaders requested more support with out-of-state rules, recruiting, and appointments.

(Note: for survey questions that offered a linear choice, a "1" was always considered a no or negative and a "5" was always considered the most positive outcome or definition.)

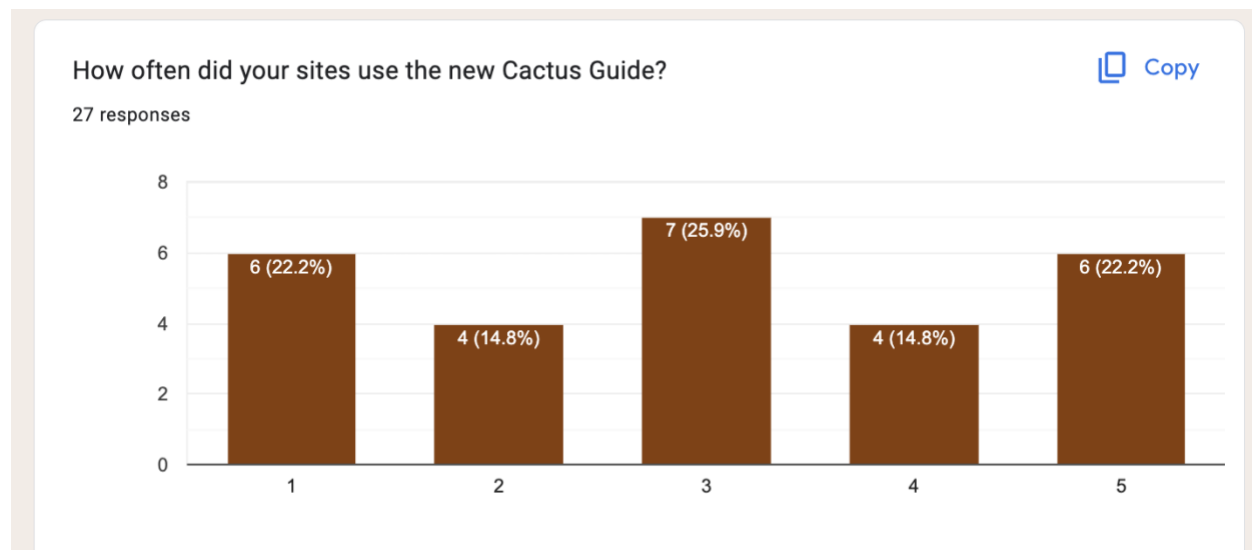
Tax-Aide Leadership Survey:



#1-4) About 66% of respondents were Local Coordinators, primarily from urban sites (85%) and the majority (70%) chose "Site level (appointments, schedules, etc.)" as comprising the bulk of their administrative duties.

#5) Representative responses to the question, "Considering just state-level issues in this question, how could the Arizona management team help you perform your administrative duties?" included:

- *Help in fall for training, appointment program and recruitment.*
- *Better training on administrative tasks.*
- *Talent development should be your top priority.*
- *Hold regular pre-season and tax season open Q & A sessions.*
- *Need a regular District Coordinators, not interim.*
- *Cactus Guide is great, make sure it stays updated.*
- *Training for new leaders.*
- *Timely responses to questions & issues.*
- *Work with National to improve portal and LMS to avoid having to re-enter data.*
- *Please do not add any administrative duties.*
- *Help with appointment software and training. But both are driven at a district, not state level, so not sure how state can help.*
- *Have a point of contact for tax questions. Make the Cactus Guide easier to navigate.*
- *Training more relevant to the tax returns we usually experience.*

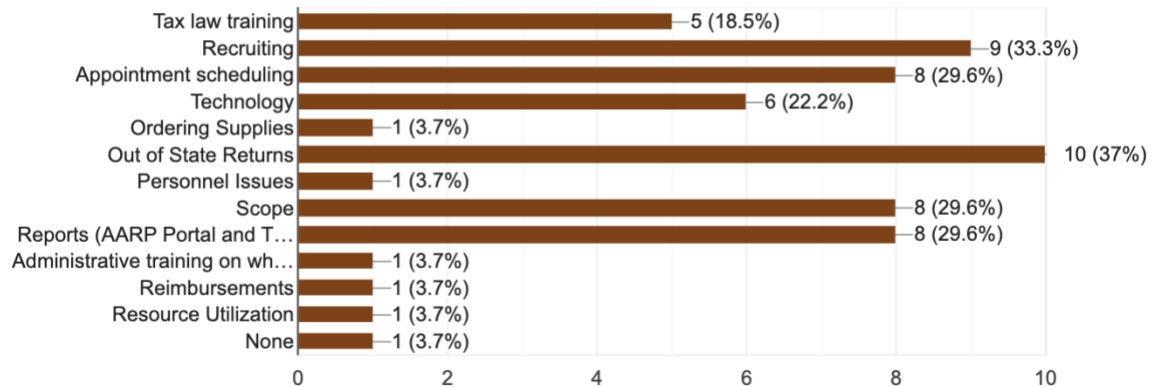


#6) Use of the Cactus Guide did not have a clear trend. With further refinements this year, the Cactus Guide should be bookmarked as a reference on all volunteers' Chromebooks.

In which of the following areas would you like some additional help, materials, or support?

 Copy

27 responses



#7) When asked about areas in which additional help was needed, the leading topics were:

- a. *Out-of-State*
- b. *Returns*
- c. *Recruiting*
- d. *Appointment scheduling*
- e. *Scope*
- f. *Reports.*

#7) Representative comments for "additional help, materials, or support needed" within those individual topics included:

Out-of-state returns --

- *Further clarification on what state tax returns other than AZ can be done.*
- *Any way to streamline?*
- *Would like AZ to participate in the State Tax Assistance Program (STAP)*
- *We need the ability to help snowbirds with out-of-state returns.*
- *Think we should be able to do.*
- *More clarity*

Recruiting --

- *The hardest position for us to recruit for is the Greeter position.*
- *We have too few volunteers, period.*
- *Spanish-speaking volunteers.*
- *Need some national resources/website information to recruit new staff.*

Appointment scheduling --

- We had 20% no-shows. *Hard to know if overbooking will work or how many volunteers are needed.*
- How to *program schedules* in Appointlet.
- We use the AARP program, *would like a POC to help with technical problems.*
- Method to automatically send taxpayers appointment reminders via e-mail or text
- Being able to print a list of clients each day.

Scope --

- Would like to *explore making home solar credit within scope.*
- Information about *what is in scope for Schedule C* returns.
- AARP scope is too broad. We should only be doing simple returns. If they require more tax documents (e.g.: MFS, SCH K, etc.) they should be going elsewhere.
- Tell us *WHY* things are out of scope.

Reports (administrative) --

- *Better step-by-step instructions on how to locate (the most difficult part) and complete the report.*
- *The portal is difficult to navigate.*
- Training on *how to generate reports, which ones to do and how to use them.*
- I wish the *certification database included their site location number and role(s).* This would save creating a separate report to show certification status at the site level for LC monitoring and follow-up.

Technology --

- Assistance needed in setting up new equipment such as printers and *someone to contact when computer issues come up at sites.*
- Need *good WiFi* or tax prep becomes almost impossible
- We hate Chromebooks
- Scrap LMS
- Refine the process for *getting Chromebooks into new volunteers' hands sooner to aid them in completing training.*

Tax law training --

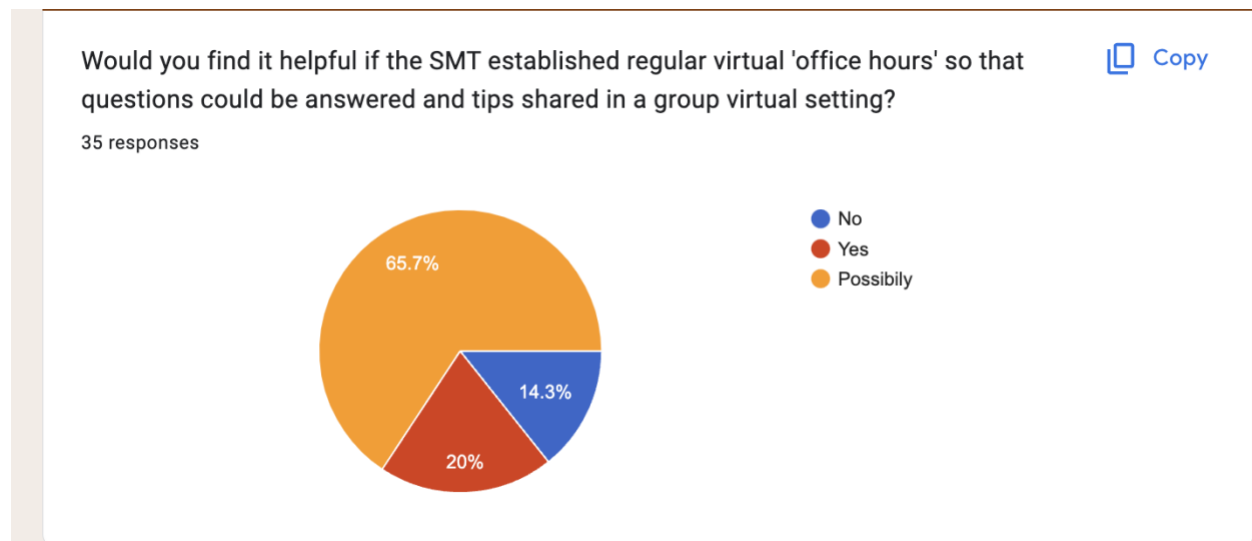
- We need *more training specifically with AZ.* Problem due to TS rarely having the state available until after training, and AZ is late with forms as well.
- *Simple guidelines without having to go to multiple sources.*
- It would be helpful to have *more tax training, especially the changes,* for the tax preparers.
- *Eliminate the videos on the portal, as we had new volunteers that were not able to access the videos without proper status.*

Ordering supplies --

- *The test booklets should be available in print and workbooks sent out sooner.*

Other --

- *There are a number of fine resources within aztax-aide.org, yet I don't see or hear counselors regularly accessing the information.*



#8) Opinions were across the spectrum for regular virtual office hours, though a majority indicated they might find them useful. SMT will consider following through.