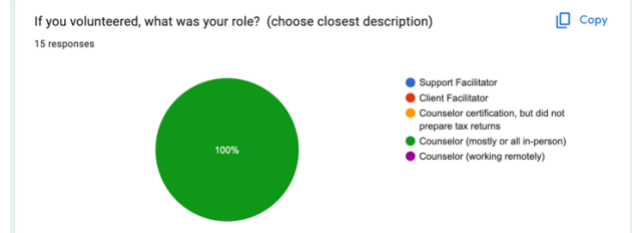
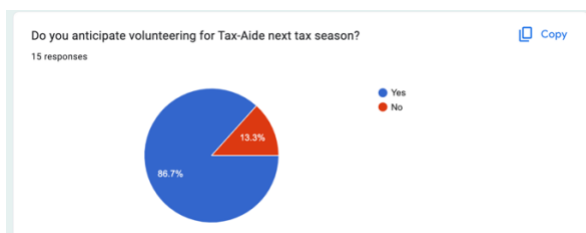
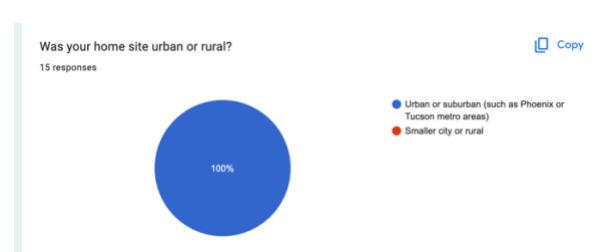
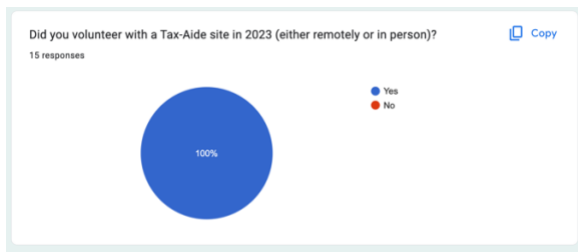


TY22 New Volunteer Training Survey Summary

In June, 2023, short surveys were sent to first-year Tax-Aide volunteers inquiring about their experiences during training and their initial experience as tax counselors. The results show us that our volunteers continue to have many questions about AZ returns and remain less than enamored with the national portal and LMS classes.

(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.)

New volunteers survey:

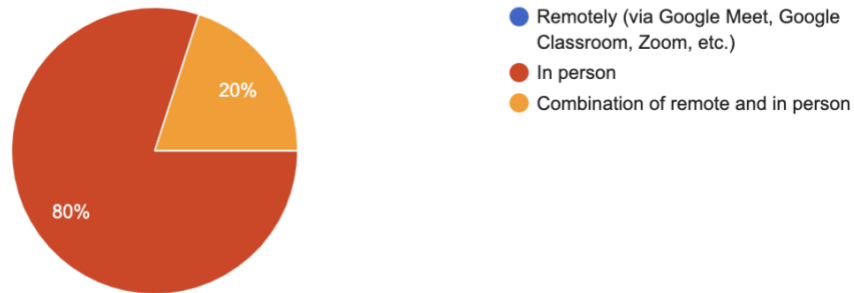


#1-4) All respondents volunteered at an urban site as a counselor. A large majority (86%), plan to continue volunteering with us in the future.

How did you receive your tax instruction training?

 Copy

15 responses

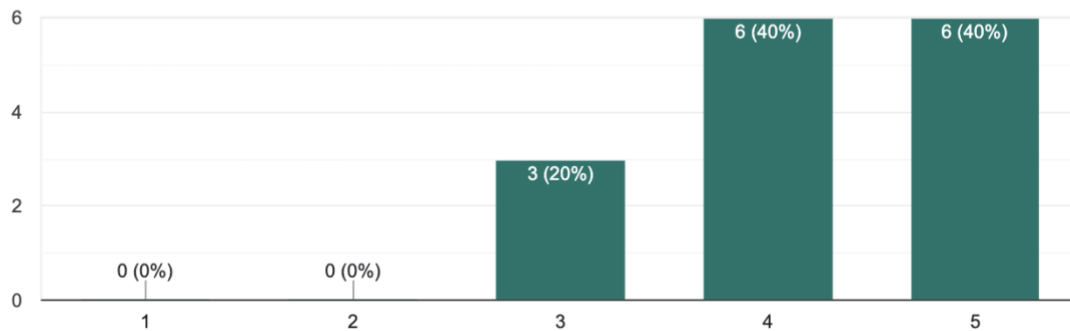


#5) The majority of volunteers (80%) received their training in person, with no one reporting having received their training remotely.

Did your training prepare you for your first taxpayer?

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15 responses



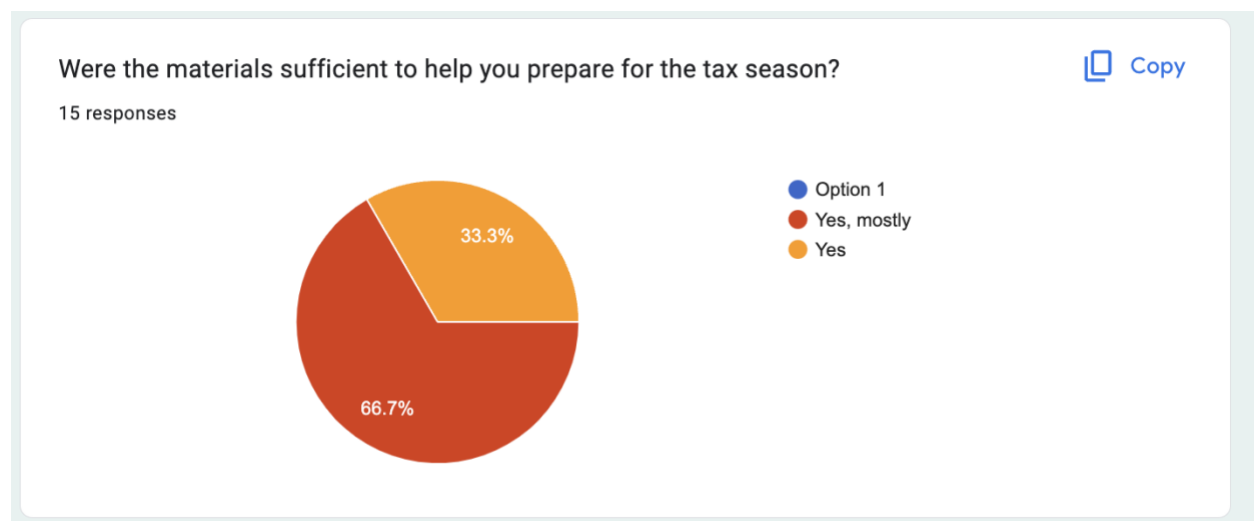
#6) A large majority of new volunteers responded favorably to the question, "Did your training prepare you for your first taxpayer?" None of the respondents choose a negative response to that question.

#7) When asked for more details, here are some representative responses to what the volunteers reported as the “most valuable part of your training.” :

- *Doing and reviewing the exercises. You learn by doing.*
- *The ability to work on practice problems using the practice software.*
- *Doing examples daily.*
- *Doing the case studies and related questions, then going over them in class.*
- *Updates on new state tax laws.*
- *TaxSlayer practice lab and using the software.*
- *Having more experienced preparers there to assist with any questions.*

#8) For those volunteers with the opposite experience or comment, here are some responses to the question of “If you DID NOT feel adequately prepared for you first taxpayer, what could have been changed? :

- *More about state taxes would be helpful*
- *More training examples with step-by-step correct answers provided*
- *Would have liked to have had 1 or 2 experienced ‘floaters’ in each class to clarify points one-on-one without grinding the whole class to a halt*
- *I’d like to see study materials better aligned with daily lessons.*
- *A second day of training.*

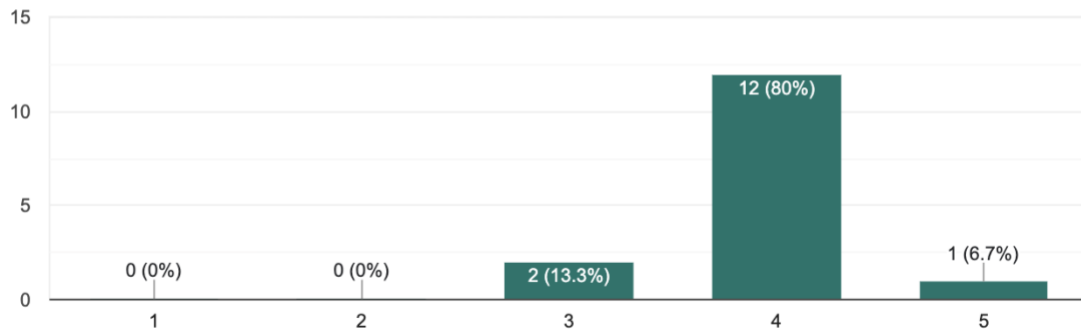


#9) The Tax-Aide materials were gauged as mostly sufficient to prepare the new volunteers for the season, with zero negative responses.

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

 Copy

15 responses

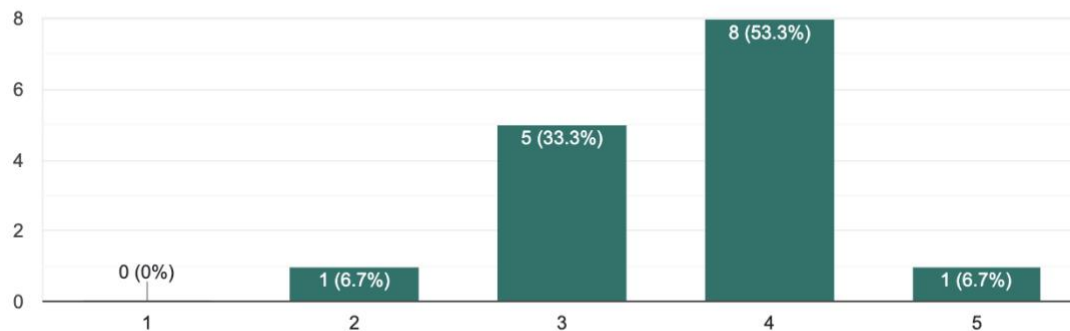


#10) The majority (87%) described themselves as adequately or completely trained to prepare a federal tax return. That percentage number is encouraging, but there is room for improvement.

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

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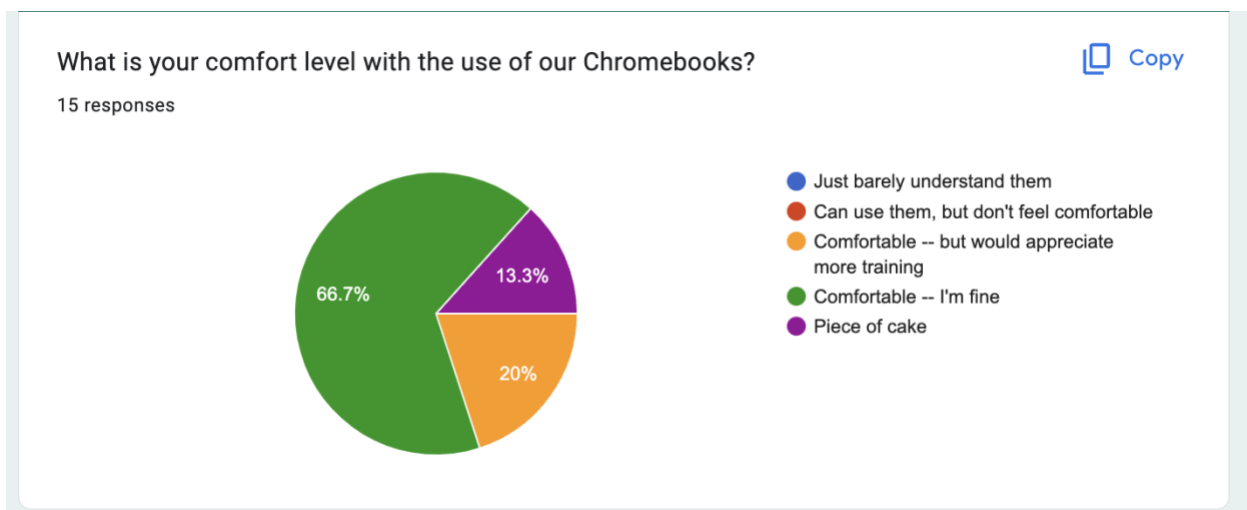
15 responses



#11) The number of volunteers who rated themselves as adequately trained to prepare an Arizona return was lower by 27% than federal return competency. We need to continue to support and maximize Arizona tax training. There was a slight increase for AZ competency over last year.

#12) A general question of, "Is there any other way your training could be improved?" yielded the following representative comments:

- Walk everyone thru the **list of useful links (prop tax, etc), then have them bookmarked.**
- **More about AZ carryover, education credits and energy credits.**
- **Needed more state training. So much of our training didn't pertain to our facility.**
- **More practice with Bogart tools. Better detail on how to handle gig workers, PTCs, HSAs, and how to pull the Div/Int/CG numbers off of brokerage statements.**
- **Walk the entire class thru a full sample return early in the week, with everyone entering on their own laptops as you go.**
- **Being able to review what was said in class both before and after the class would be very helpful.**
- **Also, I often felt the class presentations were paced by classmates who were more experienced – they answered the questions. The less experienced were left in the dust.**

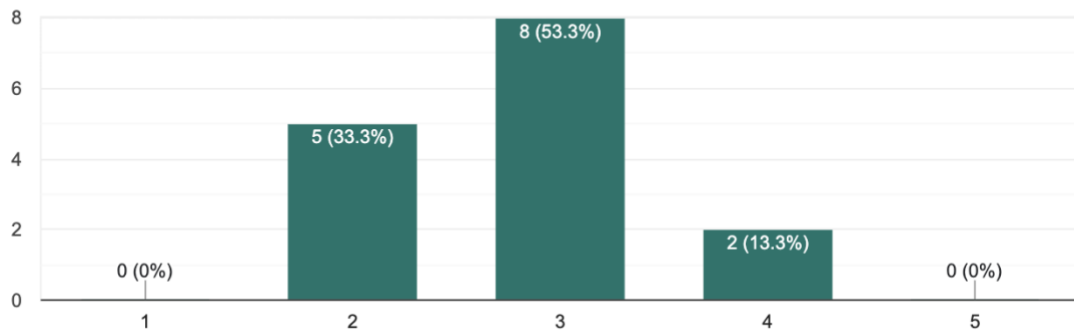


#12) All respondents reported being comfortable with Chromebooks, with 20% saying they would appreciate some additional training.

How often did you use the Cactus Guide as a resource for AZ taxes?

 Copy

15 responses

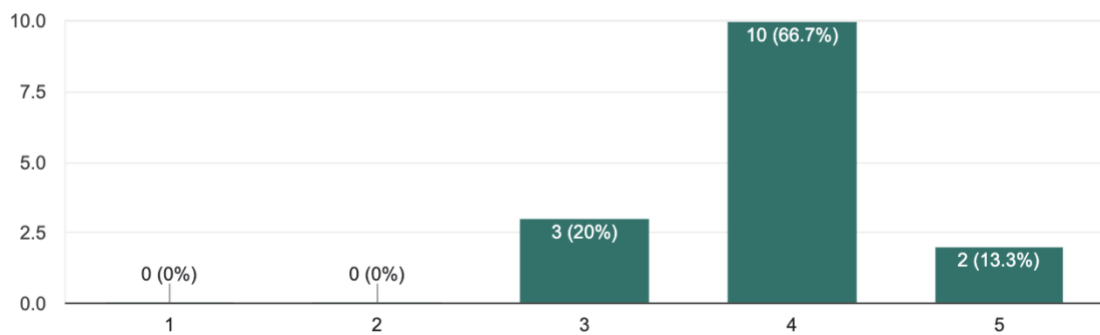


#13) Usage of the Cactus Guide drew a middle-of-the-road response. With further refinements this year, the Cactus Guide should be bookmarked as a reference on all volunteers' Chromebooks.

Rate your level of comfort in using the AZ Tax-Aide website effectively.

 Copy

15 responses



#14) The AZ Tax-Aide website had a higher level of usage.

#15) Responses to the question "What subjects or links did you most often seek out when using the AZ Tax-Aide website?" included:

- *Property taxes*
- *Charity links*
- *Bogart tools*
- *Not sure what the Cactus Guide is*
- *Used the white paper on charitable contributions fairly often.*

#16) The final survey question was, "What one thing could the AZ state management team do to improve your Tax-Aide experience?"

- *More time spent on state training, as it is more complicated than federal.*
- *Review returns after they are prepared. I often left a session and wondered if I did some thing right. Didn't always know what the final reviewer fixed!*
- *More practical exercises and review results during training.*
- *During the regular tax season, have at least one experienced floater available to answer question at the site level, so that volunteers aren't left staring at clients with nothing to say.*
- *Less acronyms used.*
- *There were days we just sat. We had several tax preparers and only 1 to 2 clients per day for the entire site.*
- *Expound on electric vehicle and solar deductions, plus more on home sale.*
- *More examples during training with correct answers provided.*
- *Training could maybe have breakout sessions for specific topics of interest.*
- *I'm extremely impressed with the dedication the management team has.*
- *My site supervisor was a key component of my training.*