

United Way of Addison County  
 Results Based Accountability  
 Performance Measures Worksheet

Program: Free Tax Program - brainstorm and vote		Date: 11/26/13 2012 tax year/2013 tax season	
<u>How much did we do?</u>	#	<u>How well did we do it?</u>	#
# AARP Returns prepared	5	% volunteers who complete training and successfully pass tests	1
# Fast Tax Returns facilitated	5	% Client Satisfaction	2
# Fast Tax Returns thru website	5	% refer to friend or family member	3
# People served	2	Prepared client return rate	5
# volunteers/interns	4	Fast Tax client return rate	5
# volunteer hours served	5	% returns completed within 1 sitting	1
# hours training	3	% returns completed within 1 hour	1
# sites	2	% of returns rejected	2
# of late afternoon/evening/weekend appointments	5	% fast tax returns that are through website without volunteer assistance	3
		%Increase in Fast tax returns filed	3
		% of late afternoon/evening/Weekend appointments	5
<b><u>Is anyone better off?</u></b>			
Estimated tax preparation fees saved (average \$273 rate—NATP)			
Total Refunds			5
Estimated earned income tax credit and other credit			5
Dollars returned to household budgets & community			5
Refund \$ diverted to savings accounts			5
			4

**RBA – Data Development Plan - UWAC/RSVP Free tax program**

	Performance Measures identified by team in Quadrant Exercise Note: Should have at least on from UR and LR quadrants	Current status *	Data Criteria - Rate High, Medium, Low			Who	When
			Communication Power (believable, understood)	Proxy Power (representative, central import)	Data Power (quality, reliable, timely, consistent)		
How much?	# AARP Returns prepared	Green	H	H	H	SG	12/31 & month end & 5/15 each tax season
	# Fast Tax Returns facilitated	Green	H	H	H	KMc	" "
	# Fast Tax Returns thru website	Yellow	H	H	H	KMc	" "
	# volunteer hours served	Yellow	M	M	M	SG	" "
How Well?	#!/% of late afternoon/evening/weekend Appointments (how much and well)	Green	H	M	H	SW	" "
	Prepared client return rate	Yellow	H	H	H	SG	" "
	Fast Tax client return rate	Yellow				SW	" "
Is anyone better off?	Estimated tax preparation fees saved (average \$273 rate—NATP)	Yellow	M	M	M	SG	" "
	Total Refunds	Red	H	H	H/L	KMc	" "
	Estimated earned income tax credit and other credit	Red	H	H	H/L	KMc	" "
	Dollars returned to household budgets & community	Yellow	L	L	L	Pass	Pass
	Refund \$ diverted to savings accounts	Red	H	H	H/L	SW	Wait a season or two
	Notes:	RSVP doesn't track refunds/ credits and seems to be unwilling and unable to do so at this point in time. Fast Tax program will determine now and going forward.					

\* Green – have & presentable right now, Yellow – have but need time to format, Red – don't have



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Program: Free Tax Program	Date: 5/4/15 2014 tax year/2015 tax season																										
Partners: RSVP, UWAC Volunteer Center, AARP, MVAA, Middlebury College, Bixby Library (additional sites: Country Home Products, Armory, Ilsley Library, Commons, and Bristol Rescue).	AARP program – volunteer prepared returns, primary focus seniors Fast Tax – supported self-prepared returns with free tax software and trained assistant, primary focus low and moderate income earners United Way Investment: Direct Salary for tax prep: \$2,067 Indirect, not quantified: printing, building, Admin Assistant (scheduling, greeting), portion of volunteer center for volunteer recruit.																										
<p align="center"><b><u>How much did we do?</u></b></p> <table border="0"> <tr> <td># AARP Returns prepared</td> <td align="right">360</td> </tr> <tr> <td># Fast Tax Returns facilitated</td> <td align="right">55</td> </tr> <tr> <td># Fast Tax Returns thru website</td> <td align="right">28</td> </tr> <tr> <td># People served: 452 AARP +137 FASTax =</td> <td align="right">589</td> </tr> <tr> <td>(Assuming a MFJ client rate of 33%)</td> <td></td> </tr> <tr> <td># volunteers/interns</td> <td align="right">7</td> </tr> <tr> <td># volunteer hours served</td> <td align="right">813</td> </tr> <tr> <td># sites</td> <td align="right">8</td> </tr> <tr> <td># of late afternoon/evening/weekend Appointments</td> <td align="right">16</td> </tr> </table>	# AARP Returns prepared	360	# Fast Tax Returns facilitated	55	# Fast Tax Returns thru website	28	# People served: 452 AARP +137 FASTax =	589	(Assuming a MFJ client rate of 33%)		# volunteers/interns	7	# volunteer hours served	813	# sites	8	# of late afternoon/evening/weekend Appointments	16	<p align="center"><b><u>How well did we do it?</u></b></p> <table border="0"> <tr> <td>Prepared client return rate</td> <td align="right">46%*</td> </tr> <tr> <td>Fast Tax client return rate</td> <td align="right">29%</td> </tr> <tr> <td>Increase in Fast tax returns filed</td> <td align="right">69%</td> </tr> <tr> <td>% of late afternoon/evening/Weekend appointments</td> <td align="right">29%</td> </tr> </table> <p>*32 AARP returns were done offsite with no records to determine the return rate. Highest possible return rate = 55% if all 32 returned.</p>	Prepared client return rate	46%*	Fast Tax client return rate	29%	Increase in Fast tax returns filed	69%	% of late afternoon/evening/Weekend appointments	29%
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## What worked?

Dedicated separate phone line  
Janice answering phones—preloading appointments early  
Janet (FASTax) and all AARP volunteers  
Taking FASTax into Working Bridges (MC and porter)  
Planning, coordination, and communication among everyone involved in both programs  
Expanding appointment slots  
Tom, John, and Steve answering questions—strong customer service  
Email checklist  
Software more user-friendly  
Bristol AARP site  
Charlie as IT guru

## What Can We Do Better?

\* Target these improvements next tax season

Preparation for anticipated projected number of returns  
Contact CCV summer/fall \*  
Recruit more volunteers from DOC forward—in case of drops\*  
Complete tax training before calendar year-end  
More advertising in December/expanded social media promotion  
Additional scheduling questions: (1) Return client? (2) # of people filing?  
Evening/weekend appointments—with volunteers working in pairs for safety  
Notice about parking during high volume days\*  
Ask volunteers about other areas of interest during the offseason  
MC J-term poverty financial opportunity? (students)  
Another volunteer like Janice (answering phone calls, scheduling, familiarity with tax filing process)\*  
Targeting early ed. centers, HOPE, and CSAC as potential FASTax satellites (with enough volunteers)  
Early IT with new and/or donated computers  
Expanded and earlier outreach to clients at Working Bridges site\*