

RSVP Tax Counselor Performance Review Form

Performance Review of (name); _____ ID# _____

GENERAL

Date _____

1. Rate this volunteer's performance (as excellent; good; fair; poor) with regard to:

- a. Interviewing techniques _____
- b. Clarity and neatness of writing _____
- c. Accuracy in preparing tax returns _____

2. Has this volunteer:

- a. Been properly certified in accordance with the procedures specified in the Handbook? _____
- b. Worked at the assigned site as scheduled? _____
- c. Maintained the confidentiality of taxpayers and all tax-return information? _____
- d. Made productive use of assigned working hours? _____

3. Did this volunteer:

- a. Complete and submit CAR forms by the required dates and according to instruction? _____
- b. Avoid conflict of interest situations and any appearance of remuneration for services? _____
- c. Promote and support the AARP Tax-Aide program through word of mouth, site publicity or other means? _____
- d. Properly prepare and submit an expense statement at the end of the tax season? _____

ADDITIONAL EVALUATION CRITERIA (optional)

Should this volunteer be invited to counsel next year? Yes _____ No _____

Does this volunteer have leadership potential? Yes _____ No _____

If Yes, in what capacity? _____

COMMENTS: (Use back of the form if necessary)

Supervising Coordinator signature _____ ID# _____