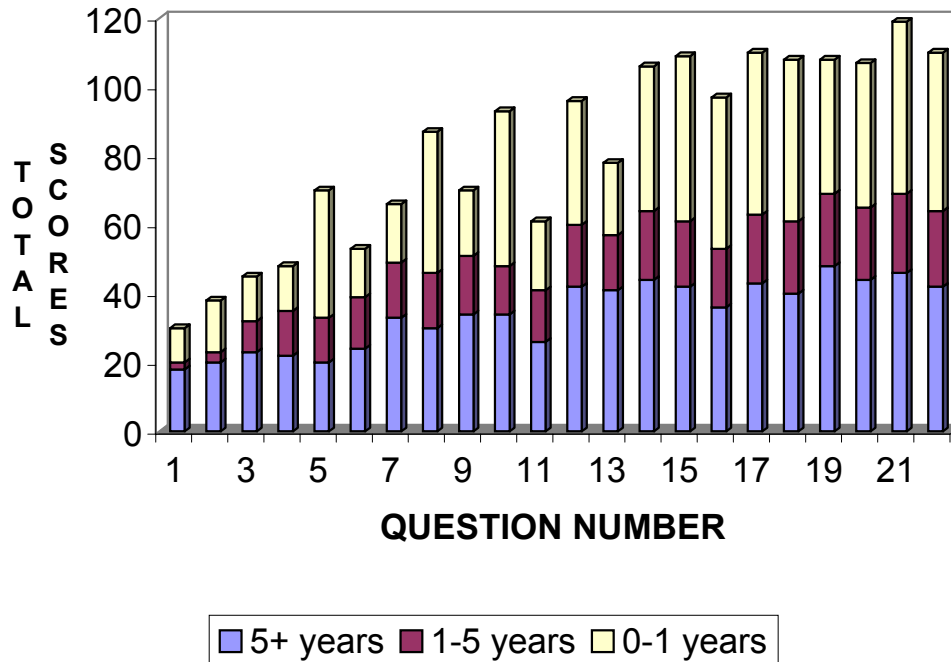


RSVP 203 SURVEY TOTAL SCORES



AVERAGE SCORES*

| | | |
|----|---|-----|
| 1 | Would you be willing to volunteer for Home Owners & Renters | 2.0 |
| 2 | I would like to also be a coordinator, instructor etc | 2.4 |
| 3 | <u>I would be willing to work more days per week.</u> | 2.5 |
| 4 | I am willing to serve periodically as a tax volunteer June-Dec. | 2.7 |
| 5 | All tax returns are quality reviewed. | 2.8 |
| 6 | <u>The organizational chart needs to be revised and communicated.</u> | 2.9 |
| 7 | The program's organizational charts are communicated and helpful. | 3.5 |
| 8 | IRS provides adequate support. | 3.5 |
| 9 | <u>Program-advisory and support committees give needed help.</u> | 3.5 |
| 10 | Sites are monitored & helped as needed. | 3.6 |
| 11 | Recruiting resources provide adequate assistance. | 3.6 |
| 12 | <u>Reports (CARs, etc.) are submitted accurately & timely.</u> | 3.8 |
| 13 | The Tax Site facilities are adequate and receive needed support. | 3.9 |
| 14 | Necessary equipment is available. | 3.9 |
| 15 | <u>Materials, forms & supplies are sufficient.</u> | 4.0 |
| 16 | Information is communicated as & when needed. | 4.0 |
| 17 | Counseling sites have enough counselors. | 4.1 |
| 18 | <u>Volunteers are well trained for each of the jobs they assume.</u> | 4.2 |
| 19 | Counseling sites are well managed. | 4.2 |
| 20 | Testing & certification are consistent, adequate & fair. | 4.3 |
| 21 | Supervisors recognize volunteers' service. | 4.6 |
| 22 | Program goals are clearly stated. | 4.6 |

* AVERAGE = TOTAL / NUMBER RESPONDING

| QUESTIONS ARRANGE LOWEST - HIGHEST SCORE | LENGTH OF SERVICE | | | | | | | | | | | | | | | NUMBER OF RESPONDENTS ANSWERING | | | | | | | | | | | | |
|--|---------------------------|----|----|----|----|-----------|----|----|----|----|-----------|----|----|----|----|---------------------------------|----|----|----|----|----|----|----|----|----|----|----|----|
| | OVER 5 YEARS | | | | | 1-5 YEARS | | | | | 0-1 YEARS | | | | | | | | | | | | | | | | | |
| | ONE COLUMN PER RESPONDENT | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 22 Would you be willing to volunteer for Home Owners & Renters | 1 | 1 | 4 | 5 | 2 | 1 | 1 | 1 | 2 | 1 | 1 | 1 | 3 | 5 | 1 | 15 | | | | | | | | | | | | |
| 21 I would like to also be a coordinator, instructor etc | 1 | 1 | 4 | 5 | 3 | 1 | 1 | 3 | 1 | 2 | 1 | 1 | 3 | 5 | 5 | 1 | 16 | | | | | | | | | | | |
| 02 I would be willing to work more days per week. | 1 | 5 | 1 | 2 | 2 | 4 | 1 | 4 | 1 | 2 | 3 | 4 | 1 | 1 | 3 | 2 | 3 | 5 | 18 | | | | | | | | | |
| 15 I am willing to serve periodically as a tax volunteer June-Dec. | 1 | 2 | 4 | 4 | 3 | 1 | 4 | 1 | 2 | 3 | 4 | 1 | 1 | 4 | 3 | 2 | 3 | 5 | 18 | | | | | | | | | |
| 11 All tax returns are quality reviewed. | 1 | 2 | 2 | 2 | 1 | 3 | 1 | 2 | 2 | 4 | 5 | 4 | 3 | 1 | 5 | 4 | 3 | 5 | 5 | 1 | 1 | 4 | 5 | 3 | 1 | 25 | | |
| 18 The organizational chart needs to be revised and communicated. | 1 | 1 | 4 | 2 | 4 | 1 | 5 | 2 | 4 | 3 | 4 | 1 | 3 | 4 | 3 | 5 | 3 | 3 | 18 | | | | | | | | | |
| 17 The program's organizational charts are communicated and helpful. | 4 | 5 | 3 | 3 | 4 | 4 | 3 | 4 | 3 | 2 | 4 | 5 | 3 | 2 | 5 | 3 | 5 | 1 | 3 | 19 | | | | | | | | |
| 05 IRS provides adequate support. | 4 | 5 | 4 | 2 | 3 | 4 | 2 | 3 | 2 | 1 | 1 | 4 | 3 | 4 | 4 | 5 | 5 | 5 | 5 | 2 | 3 | 3 | 5 | 4 | 4 | 25 | | |
| 16 Program-advisory and support committees give needed help. | 4 | 4 | 5 | 3 | 2 | 4 | 1 | 3 | 5 | 3 | 3 | 4 | 5 | 3 | 2 | 5 | 5 | 5 | 1 | 3 | 20 | | | | | | | |
| 13 Sites are monitored & helped as needed. | 5 | 5 | 3 | 2 | 3 | 5 | 1 | 1 | 5 | 4 | 3 | 3 | 3 | 3 | 2 | 5 | 3 | 5 | 5 | 5 | 5 | 1 | 4 | 5 | 4 | 3 | 26 | |
| 19 Recruiting resources provide adequate assistance. | 4 | 5 | 1 | 4 | 1 | 3 | 5 | 3 | 4 | 3 | 5 | 3 | 5 | 4 | 5 | 3 | 3 | 17 | | | | | | | | | | |
| 12 Reports (CARs, etc.) are submitted accurately & timely. | 5 | 4 | 5 | 2 | 2 | 3 | 5 | 2 | 5 | 5 | 4 | 4 | 4 | 5 | 3 | 2 | 5 | 3 | 4 | 5 | 4 | 3 | 5 | 3 | 4 | 25 | | |
| 20 The Tax Site facilities are adequate and receive needed support. | 5 | 4 | 5 | 2 | 4 | 4 | 5 | 1 | 1 | 5 | 5 | 4 | 4 | 5 | 3 | 5 | 1 | 5 | 5 | 5 | 20 | | | | | | | |
| 08 Necessary equipment is available. | 5 | 5 | 5 | 5 | 3 | 3 | 5 | 3 | 1 | 5 | 4 | 4 | 4 | 5 | 4 | 3 | 5 | 1 | 5 | 3 | 5 | 1 | 4 | 5 | 4 | 4 | 5 | 27 |
| 07 Materials, forms & supplies are sufficient. | 4 | 3 | 3 | 4 | 4 | 3 | 4 | 3 | 5 | 5 | 4 | 4 | 2 | 5 | 4 | 4 | 4 | 5 | 5 | 5 | 5 | 1 | 5 | 4 | 5 | 4 | 5 | 27 |
| 06 Information is communicated as & when needed. | 4 | 4 | 5 | 3 | 4 | 3 | 5 | 5 | 3 | 2 | 4 | 4 | 4 | 3 | 5 | 5 | 5 | 4 | 5 | 2 | 4 | 5 | 4 | 5 | 24 | | | |
| 10 Counseling sites have enough counselors. | 4 | 5 | 5 | 2 | 4 | 4 | 5 | 1 | 3 | 5 | 5 | 4 | 5 | 5 | 4 | 2 | 5 | 4 | 5 | 5 | 5 | 4 | 1 | 5 | 5 | 4 | 4 | 27 |
| 03 Volunteers are well trained for each of the jobs they assume. | 5 | 4 | 4 | 2 | 2 | 4 | 5 | 1 | 5 | 4 | 4 | 5 | 5 | 5 | 4 | 2 | 5 | 5 | 5 | 5 | 4 | 5 | 4 | 5 | 4 | 5 | 26 | |
| 09 Counseling sites are well managed. | 5 | 5 | 5 | 5 | 3 | 4 | 5 | 3 | 3 | 5 | 5 | 4 | 5 | 5 | 4 | 3 | 5 | 1 | 5 | 5 | 5 | 1 | 4 | 5 | 4 | 4 | 26 | |
| 04 Testing & certification are consistent, adequate & fair. | 4 | 5 | 5 | 3 | 2 | 4 | 5 | 5 | 5 | 2 | 4 | 4 | 5 | 5 | 4 | 3 | 5 | 5 | 5 | 5 | 5 | 5 | 4 | 5 | 4 | 4 | 25 | |
| 14 Supervisors recognize volunteers' service. | 5 | 5 | 5 | 3 | 4 | 4 | 5 | 5 | 5 | 5 | 4 | 5 | 5 | 5 | 4 | 5 | 3 | 5 | 5 | 5 | 4 | 5 | 5 | 5 | 4 | 4 | 26 | |
| 01 Program goals are clearly stated. | 5 | 5 | 5 | 4 | 4 | 5 | 5 | 5 | 4 | 5 | 5 | 5 | 5 | 2 | 5 | 5 | 5 | 5 | 2 | 5 | 5 | 5 | 4 | 5 | 24 | | | |
| Individual Form identifiers | a | b | c | w | x | d | e | f | g | h | i | j | y | k | l | m | n | z | o | p | q | r | s | t | aa | u | v | |
| NUMBER OF QUESTIONS ANSWERED BY EACH RESPONDENT | 22 | 15 | 22 | 21 | 21 | 22 | 18 | 18 | 22 | 21 | 17 | 22 | 20 | 22 | 17 | 19 | 16 | 12 | 18 | 22 | 22 | 15 | 15 | 14 | 13 | 13 | 15 | |

New RSVP Form containing these questions not used. AARP Form use instead.

2003 Survey Questions Summary

(lower case letters refer to the individual responders forms. See footnote of table on preceding page)

1. **What Worked well?** (describe *e.g.* innovations, successes, goals that were attained *etc.*)
 - d) Clients made happy
 - e) Computers which minimized mistakes and maximized time
 - g) Support from other volunteers doing taxes
 - h) It all worked well
 - k) Computer programs worked well
 - l) Computers were up and operational when needed!
 - p) Working with more experienced people at site
 - q) Goals attained
 - s) Site staff (receptionist) were very helpful
 - t) Sufficient training is completed
 - u) Set up and supervision
 - y) Scheduling, Site organization, and basic-training
2. **What didn't work well?** (describe *e.g.* problems that you need help in solving, goals that were not attained *etc.*)
 - d) Lack of Forms early in year and need to screen clients for eligibility
 - g) Clients keeping and preparing records for the Tax year
 - k) e-filing did not work
 - p) Beginner's class needs to be more fun and exciting to help learning – rather than reading from book
 - r) Absolutely no supplies
 - s) Appointments not kept by clients, walk-ins, and clients making appointments at multiple sites
 - y) Only minor glitches – needed addition counselors – site scheduled clients on closed holidays
 - aa) Not enough equipment for e-filing – only one laptop was available
3. **What Support do you need?** (*e.g.*, training in specify, communication, publicity, supplies, equipment, *etc.*)
 - l) Envelopes to mail Federal and State returns
 - q) Training in Tax preparation
 - r) Supplies and equipment
 - s) Equipment & supplies. Forms booklet at site (Package X) and Federal Return envelopes
 - y) Supplies were late to site occasionally – need to remind clients to bring forms and previous return
4. **Specific ideas for program improvement:** (*e.g.* how to reach more customers, bring in more volunteers, improve training *etc.*)
 - e) Try to encourage more use of computers
 - k) More sites to serve more people and simplifying instead of complicating Tax Code
 - q) How to reach more customers
 - t) Too often counselors left with no customers – not sure how service is advertised – perhaps flyers, posters at centers, note on IRS Web Site or Instruction booklets
 - w) Assure that all nutrition sites have notice posted if directly served
 - y) Post service on Centers bulletin board and newsletter
 - aa) Computer equipment for e-filing
5. **Specific actions I will take to improve AARP Tax-Aide service in my territory or area of responsibility:**
 - e) Try to encourage more use of computers
 - t) Help get the word out to reach more customers – postings, word-of-mouth
 - y) Offer to assume more responsibilities and give more time. Recruit preparers and promote service
6. **Other:** (let off steam or brag about someone or something)
 - e) Clients some of the best I have ever served (over 5 years of service)
 - k) Tax Code is getting worse
 - r) Need more California information – 540 Instruction Booklets
 - t) Majority of training done by reading from book – a bit dry and dull. Perhaps include a few real-world examples that cover most of what we see – can highlight what is *most* relevant ahead of detailed study.
 - w) Advise clients they may experience a 30 to 60 minute delay in being served. Don't scheduling too many sites on the same day because it reduces the number of potential backup (substitute) counselors.