**RBA Session 2- handout 1**

**United Way of Addison County**

**Results Based Accountability**

**Performance Measures Worksheet**

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| --- | --- | --- | --- | --- |
| Program:  Free Tax Program - brainstorm and vote | | Date: 11/26/13  2012 tax year/2013 tax season | | |
| **How much did we do?** | # | | **How well did we do it?** | # |
| # AARP Returns prepared  # Fast Tax Returns facilitated  # Fast Tax Returns thru website  # People served  # volunteers/interns  # volunteer hours served  # hours training  # sites  # of late afternoon/evening/weekend  Appointments | 5  5  5  2  4  5  3  2  5 | | % volunteers who complete training and successfully pass tests  % Client Satisfaction  % refer to friend or family member  Prepared client return rate  Fast Tax client return rate  % returns completed within 1 sitting  % returns completed within 1 hour  % of returns rejected  % fast tax returns that are through website without volunteer assistance  %Increase in Fast tax returns filed  % of late afternoon/evening/  Weekend appointments | 1  2  3  5  5  1  1  2  3  3  5 |
| **Is anyone better off?** | | | |  |
| Estimated tax preparation fees saved (average $273 rate—NATP)  Total Refunds  Estimated earned income tax credit and other credit  Dollars returned to household budgets & community  Refund $ diverted to savings accounts | | | | 5  5  5  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 |  | | **H** | **H** | **H** | **SG** | **12/31 & month end & 5/15 each tax season** |
| # Fast Tax Returns facilitated |  | | **H** | **H** | **H** | **KMc** | **“ “** |
| # Fast Tax Returns thru website |  | | **H** | **H** | **H** | **KMc** | **“ “** |
| # volunteer hours served |  | | **M** | **M** | **M** | **SG** | **“ “** |
| How Well? | #/% of late afternoon/evening/weekend  Appointments (how much and well) |  | | **H** | **M** | **H** | **SW** | **“ “** |
| Prepared client return rate |  | | **H** | **H** | **H** | **SG** | **“ “** |
| Fast Tax client return rate |  | |  |  |  | **SW** | **“ “** |
| Is anyone better off? | Estimated tax preparation fees saved (average $273 rate—NATP) |  | | **M** | **M** | **M** | **SG** | **“ “** |
| Total Refunds |  |  | **H** | **H** | **H/L** | **KMc** | **“ “** |
| Estimated earned income tax credit and other credit |  |  | **H** | **H** | **H/L** | **KMc** | **“ “** |
| Dollars returned to household budgets & community |  |  | **L** | **L** | **L** | **Pass** | **Pass** |
| Refund $ diverted to savings accounts |  | | **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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**Results Based Accountability**

**Performance Measures Worksheet**

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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. |
| **How much did we do?**  # 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 | **How well did we do it?**  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%  \*32 AARP returns were done offsite with  no records to determine the return rate. Highest possible return rate = 55% if all 32 returned. |
| **Is anyone better off?**  AARP/RSVP tax preparation program:  Estimated tax preparation fees saved (average $273 rate—NATP) $ 98,280  Total Refunds (360 total returns) $ 258,024  Estimated earned income tax credit and other credit EIC actual = $ 51,153  Dollars returned to household budgets & community Other credits = $ 15,562  Facilitated Self-Prepared program:  Estimated tax preparation fees saved (average $273 rate--NATP) $ 15,015  Total Refunds (83 total returns) $ 152,687  Estimated earned income tax credit and other credit EIC actual = $ 44,413  dollars returned to household budgets & community Other credits = $ 17,113  Refund $ diverted to savings accounts $ 879 | |

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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\* |