

## **CyberTax Announcement**

**November 14, 2016**

**To:** All AARP Foundation Tax-Aide Volunteers (with valid email addresses in Portal)  
**From:** Jackie Lynn Coleman, Assistant National Director, Training & Quality Assurance, AARP Foundation Tax-Aide  
**Subject:** CyberTax TY2016-02: Tax Software Transition Assessment – Coming Soon!

*Tax Software Assessment:* With the transition to TaxSlayer just ahead of us, the upcoming tax season makes for another exciting year for AARP Foundation Tax-Aide and our entire volunteer cadre. As we prepare for the transition and tax season, Tax-Aide welcomes the change as an opportunity to learn and grow. As part of this process, Tax-Aide will conduct an assessment, consisting of a pre-survey this month, November 2016 and a post-survey at the end of the 2017 tax season. The survey will be administered via email to *both* new volunteers and returning Counselors in the Tax-Aide program.

**Purpose of Assessment:** AARP Foundation and Tax-Aide are interested in assessing the extent to which the software transition affects the volunteer experience of Tax-Aide Counselors and the way in which services are delivered.

**Survey Audience:** All Counselors and Prospect Volunteers with a Candidate or Approved Assignment as of November 12.

**Sharing Results:** Initial findings will be presented to the National Leader Team and then to the State Coordinators at the September Regional Meetings and later will be shared with each State Management Team. Further, an Executive Summary will be posted on OSHC and announced via the SMT Roundup and CyberTax by late summer 2017.

**Using the Survey Results:** The results will provide Tax-Aide and volunteer leaders with insights to where we have opportunities for growth. Some growth areas may include enhancing Counselors' experience, volunteer recruitment and retention strategies, and improving training products and processes.

**Participation:** To help Tax-Aide learn from this transition, we encourage full participation from new volunteers and returning Counselors. The pre-survey will be available this month, November 2016. An announcement will also be posted in a CyberTax prior to the release of the post-survey in 2017.

If you receive a survey, please participate.

Note: Quality Site Requirement Alerts and Volunteer Tax Alerts sent as CyberTax messages are the messages that need to be retained at the site to meet IRS requirements. This message does not need to be maintained to meet that requirement. Please follow the guidance of your volunteer supervisor if you have questions.