

Resource Management for SCs

□ Situation

- Rising gas prices and reduction in IRS grant creates need to manage expenses at local levels.
 - Long term programs, especially equipment, are in jeopardy.
- Resource management skills becoming necessary at state and district levels.
- Reports available to SCs inadequate to manage the available resources.

SC Resource Management Goals

- Enable SC to measure state level expenses and determine needed improvements.
- Enable states to produce district level reports to address needed improvement areas.
- Develop DC resource management skills.
- Reduce expenses sufficiently to allow national equipment program.

SC Resource Management Objectives

☐ Conduct webinar to include:

- Suggested state generated expense reports that will enable SCs and DCs to determine expense areas to be addressed.
- Produce list of expense reducing ideas for states and districts.
- Give SCs opportunity to share position challenges and support needs.

Important State & District Level Cost Categories

- ☐ Overall cost.
- ☐ Itemized travel expenses.
- ☐ Training and meeting costs.
- ☐ Cost per return.
- ☐ Cost per volunteer
 - High cost volunteers especially.
- ☐ Returns per computer.

Note: Only the flash report is produced at district level currently, so state will need to "cut and paste" to make needed additional reports.

Currently Available Reports

Name of Report	Scope of Report				
	Nat'l.	St.	Dist.	Site	Vol.
Flash Report		X	X	X	
NLT Activity Report	X	X			
Vol. Expense Summary Report	X	X			
Vol. Exp. Detail Report	X	X			X
IRS Equipment Inventory					X
AARP Equipment Inventory					X
Note: Someone at state level will need to produce their own reports in areas not currently available in standard reports until Tax-Aide systems improve.					

District Expense Report

- Produce district level report that includes:
 - Cost per return.
 - Cost category expenses (B,C,F,I,T,W,M,K, Misc & Total).
 - High cost volunteers.
- Employs Vol. Exp. Detail, Volunteer Exp. Summary, & Flash Reports.