

INSTITUTIONAL PLANNING

Wis. Stats. 38.50 (10) (a)
Form EAB 1.10 (Rev. 11/15)



STATE OF WISCONSIN
EDUCATIONAL APPROVAL BOARD
431 CHARMANY DRIVE, SUITE 102
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The Educational Approval Board (EAB) is a postsecondary education agency that employs a regulatory model focused not only on compliance, but also institutional effectiveness. To facilitate an environment in which schools seek to be effective organizations that improve over time, the EAB requires schools to submit evidence appropriate planning has been conducted. Although similar to a strategic or business plan, this information will enable the EAB and school officials to engage in a dialogue over time about the future of the school.

Schools that already have some type of strategic or business plan (e.g., schools that have either a corporate or accreditation plan) must adapt these documents to the following requirements and focus on Wisconsin operations and students. The EAB does not expect any school to divulge any sensitive, proprietary business information. The information must address the five elements identified below and provide the information requested.

I. SCHOOL INFORMATION

Name of School:
H&R Block

II. PLANNING ELEMENTS

A. MISSION. Describe your school's mission and vision, which identifies its purpose and its core values.

The Mission of our Institution is to provide state-of-the-art training in the preparation of federal taxes, using the most current tax laws and computer generated forms. Our highly qualified instructors ensure that all of our students' needs are fully met and that their tax training experience reflects H&R Block values of Excellence, Respect, Integrity, and Teamwork.

B. MARKET. Discuss the nature of your school and the business in which it is engaged. Describe who your existing and/or potential customers are and what motivates them to enroll in your school. Explain how you let these customers know you are in business. Finally, identify who your competitors are and how you are different from them.

The H&R Block Tax Training School provides courses for both the public and for H&R Block's internal associates. The course that is available to the public is the Income Tax Course (ITC) - an introductory tax course that is required for those who wish to become employed with H&R Block and prepare taxes. There are various reasons why a student may wish to take our course; some may take it because they wish to learn about tax preparation so that they may prepare their own taxes, while others wish to be employed by the company.

The Income Tax Course runs through the months of August-December and the company advertises at a national and local level. That advertising may include television, radio and print.

Although H&R Block has many competitors in the Tax Preparation industry, our Tax Training School is unique in that we are the largest provider of this type of hands-on course.

C. MANAGEMENT. Describe your management team and how it functions to lead, administer and position the school. If your school has advisory boards, describe how the school uses them for program and school improvement.

The management team consists of a team that directly services the state of Wisconsin as well as a team at our Headquarters located in Kansas City, MO. Within the state of Wisconsin, there are District General Managers and operations staff who ensure that schedules are promoted, classrooms are properly set up, attendance tracked and tests administered. Other leadership within the territory includes a Regional Director who ensures that the District Managers understand state requirements. All licensing reporting requirements are provided by the team in Kansas City.

The school has formal and informal methods of collecting feedback used to improve the curriculum. Instructor evaluations are completed at the completion of every course from the students and all the instructors are also given an evaluation which asks for specific feedback on the course materials, structure and testing. In addition, there is an online instructor bulletin board where instructors communicate questions and feedback and comments are tracked by the course development team.

More formal means of collecting feedback can be seen through our Presidents Field Tax Advisory Council (PFTAC), which consists of a group of seasoned tax professionals (current associates and office managers) nationwide who provide feedback on our courses.

D. SWOT ANALYSIS. Identify your school's strengths, weaknesses, opportunities and threats (SWOT). Based on the results of this SWOT analysis, provide the following:

- 3 to 5 goals for strengths/weaknesses and how they will be addressed by your school.
- 3 to 5 goals for opportunities/threats and how they will be addressed by your school.

The goals should have specific objectives, defined results, a timeline for completion and metrics (some type of evaluation or measurement) by which the institution can evaluate/measure their success. In developing its goals, the school may wish to refer to the Elements of Effective Institutions graphic that is included on the back page of this form.

Strengths: Our writers are extremely knowledgeable in the area of tax law and updates in the field. Our curriculum is constantly updated to reflect changes in tax law. We provide a state-of-the-art hands-on course that combines instructor led discussion with self-paced web based training. We have staff devoted to ensuring the success of both students and instructors, helping with any problems they may face.

Progress towards Strengths: To ensure alignment with new IRS regulations, we have made adjustments to our Income Tax Course to include more emphasis on difficult topics as identified through student feedback, updates based on changes in tax law, and the addition of an online component which allows students to review materials as often as necessary to ensure that they understand the material thoroughly. The course has been designed to meet all IRS Tier I certification exam knowledge needs. In addition to this the company encourages all Tax Pros to comply with the voluntary IRS testing recently implemented.

Weaknesses: Tax laws change every year. The timing of those changes does not always allow enough time to make corrections to the textbook and workbook. In such cases errors must be identified and communicated separately which can cause confusion, undermining efforts to make the class as user-friendly as possible.

D. SWOT ANALYSIS *(continued)*

Progress Towards Opportunities: Beginning this year we have replaced our physical textbook with an electronic textbook for our students in the hopes of improving the user experience of our ITC students. Although, we do offer our students the opportunity to buy a physical copy of our textbook if they so desire; This is a separate and additional fee from our course material fee of \$149.00. As we move forward with our ITC season we will determine if this change is truly beneficial for our students and explore further options to improve our student's experience during our course to ensure the success of our students.

Threats: Although the IRS is postponing plans to require the testing of tax preparers, many states have begun setting their own testing standards. As more states follow the lead set by NY, MD, OR, and CA compliance with several different sets of standards may complicate operations. If risk becomes an integral part of preparing taxes this may discourage students from taking the course in order to become tax preparers. It will also limit the number of students who enter the course with the intention of learning to prepare their own taxes.

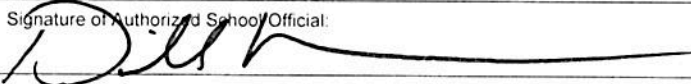
E. FUTURE THINK. Describe your school 5 years from now. What will it look like and how it will be positioned in the market place.

Tax professionals trained by H&R Block will be the industry standard to which all other companies aspire. Changes in federal tax laws, and changes in the requirements of individual states are met and mastered through agility and ever-improving knowledge of tax. Students are confident in taking the course offered by H&R Block and consumers are confident in the tax preparers who have taken the H&R Block Income Tax Course.

III. SUBMISSION

I hereby certify that the information contained on this form and any attachments to the form is true and correct to the best of my knowledge.

Signature of Authorized School Official:



Print or Type Name and Title of Authorized School Official:

Daniell Hernandez, School Licensing

Date:

8/31/2018

INSTITUTIONAL SYSTEMS

