

# INSTITUTIONAL PLANNING

EAP Form 1.10 (Rev. 11/18)



STATE OF WISCONSIN  
EDUCATIONAL APPROVAL PROGRAM  
P.O. Box 8366  
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The Educational Approval Program (EAP) 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 EAP requires schools to submit evidence that appropriate planning has been conducted. Although similar to a strategic or business plan, this information will enable the EAP and school officials to engage in a dialogue over time about the effectiveness and 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 EAP 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:

Liberty Tax Service

## II. PLANNING ELEMENTS

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

The mission of Liberty Tax School is to educate and train people to provide a general understanding of and training in income tax return preparation. Our curriculum maintains standards by which students may learn to improve their lives and obtain rewarding employment. The professional staff members believe in providing a successful educational experience for their students. Our faculty is knowledgeable income tax law and preparation of income tax returns and dedicated to providing a quality learning experience.

**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.

Liberty Tax School seeks to instruct students in a thorough and efficient manner to prepare federal income tax returns, including forms and schedules most commonly used in the preparation of individual income tax returns. It is the intent of Liberty Tax School to facilitate the vocational goals of students who are interested in seeking entry-level positions in income tax preparation businesses. There are many companies that offer tax courses, like H&R Block. We believe our courses stand out because we have online courses with audio/video training that supplements the textbook. We also have over two thousand offices that offer live day & evening courses, which gives the students exposure to the tax office and computer software.

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**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.

Liberty Tax Schools are managed from the Corporate office down to the franchise-owned offices. We have a team with hundreds of years of experience that have put together a solid curriculum for basic income tax preparation. This curriculum is evaluated and updated annually to reflect tax law changes. Internally, we have a Continuing Education Program for our tax return preparers, instructors, and tax professionals to ensure they are performing to their absolute potential. We have also partnered with national CE providers to allow employees to continue their education.

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**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:** We offer a variety of courses ranging from basic tax return preparation skills to more areas of advanced federal taxation. Every student must successfully pass exams that are created and regularly updated by our Corporate office personnel. Offices offer job placement for students who meet employment criteria. We have a tremendous amount of knowledge in our Franchise model and we need to continue to capitalize on that strength.

**Weaknesses:** We feel we struggle with providing state education and have partnered with highly successful owners of Liberty Tax offices to write and update Qualifying Education books for certain states. This method is proving to be successful and we will expand on this opportunity. We feel we still struggle with ensuring consistent course instruction across our individually owned offices. We are addressing this weakness by providing a Train the Trainer series for Franchisees to use to train their instructors on a consistent course program. We also struggle with making sure we update course changes yearly based on tax law changes and providing this course as error-free as possible. We are addressing this with additional staffing of Licensed Enrolled Agents to help with updating the curriculum every year based on tax law changes. Our accountability of our Franchise Owners to report tax school data to our Corporate office needs to improve. We began this process much earlier this year.

**D. SWOT ANALYSIS** *(continued)*

Opportunities: As tax laws changes, Liberty Tax School can leverage its qualified, experienced, and talented professionals to compete with its competitors and beat them to market with superior offerings in tax education. As improvements in technology appear, Liberty Tax School can leverage its professionals to produce a better learning product more quickly. As the Liberty Tax brand becomes more widely recognized as the premiere retail tax preparation business, we will be able to enter previously untouched communities and markets and provide opportunities to residents in those areas. Our Learning Management System is continuously being updated to provide a better learning environment for instruction.

Threats: Competition in this space is fierce. We constantly face challenges with regard to maintaining and/or improving market share. We continue to face challenges with our branding and with regard to identity in some markets. The frequency and timing of changes in tax law threaten our ability to go to marketing with quality, accurate course offerings on a timely basis. The labor market is one of the biggest threats, if not the biggest, as we struggle to ensure we have qualified individuals to teach our course. We are addressing this through additional training options provided by our Corporate office to ensure an organized standard of instruction.

**E. FUTURE VISION.** Describe your school 5 years from now. What will it look like and how will it be positioned in the marketplace.

We are expanding our ability to provide quality state income tax instruction with regard to those states with individual income tax laws, increasing the overall tax preparation skills of our students. We will continue to improve and evolve our Train the Trainer series to ensure we have a consistent product being offered across the state of Wisconsin. We will improve accountability from our franchise owners back to our Corporate office to improve our ability to be a good partner. Updates to our LMS system will allow a more interactive approach to in class instruction, which will set us apart in the industry.

**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:

*Samantha Slapnik*

Print or Type Name and Title of Authorized School Official:  
Samantha Slapnik

Date:  
8/31/2023

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# INSTITUTIONAL SYSTEMS

