



## California Association for Micro Enterprise Opportunity

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### Attachment B – H&R Block Track

#### **ORGANIZATIONAL**

1. Does your organization provide any tax preparation training or education to its clients? How do you select your referral partners for your clients who request tax assistance to file Schedule C?
2. Do you provide microenterprise loans? If so, how many of your SE tax filers also applied for and received a microloan? What was the total dollar amount borrowed by SE tax filers?
3. Do you use a customized intake form or procedure for Schedule C or CEZ filers? If so, roughly, how long does this customized form or process add to your program's staff time in getting this SE taxpayer ready for referral to your tax preparer?
4. Do you use a customized intake form or procedure for referrals from tax preparers? If so, roughly, how long does this customized form or process add to your program's staff time to capture referral information?
5. Do you have existing relationships with H&R Block offices in your region, if so, how many?

#### **MONTHLY TRACKING**

1. How many in site visits to H&R Block?
2. How many staff members are involved in this outreach project? How many volunteers?
3. How many brochures did you distribute through H&R Block?
4. Did any referrals come into your office as a result of this marketing effort? If so, how many?
5. Have any of your H&B Block referrals converted to clients? If so, which services are they accessing? (access to capital / loan packaging / micro loan/technical assistance / business training / other (describe) :
6. What were the five most common types of businesses that your program served in this period? (i.e. childcare providers, hairstylists/barbers)
7. Please describe any obstacles or challenges encountered.



