

**IN DATABASE: DO NOT ASK**

|                      |                        |
|----------------------|------------------------|
| ORGANIZATION         | CONTACT TELEPHONE      |
| CONTACT NAME         | CONTACT E-MAIL ADDRESS |
| CONTACT ADDRESS      | LOGIN/PASSWORD         |
| PARTNER/PROGRAM TYPE |                        |
| a. LOCAL             |                        |
| b. COALITION         |                        |
| c. AARP              |                        |
| d. MILITARY          |                        |

**SCREENER INTRODUCTION**

Hello, my name is **[CALLER NAME]** calling from ORC Macro on behalf of IRS's Stakeholder Partnerships, Education, and Communication organization—you may know this organization as SPEC or IRS SPEC.

S1. May I speak to **[INSERT NAME]**?

- 01 Yes (Named person)  
 02 No (Not named person)      Skip to S3

S2. We are working with IRS SPEC to obtain feedback about your satisfaction as a local partner who works with the IRS on outreach, education, return preparation, and other tax assistance programs provided by the IRS. Are you the person at **[INSERT ORGANIZATION]** who manages or interacts with the IRS who could provide us with candid feedback about IRS SPEC?

- 01 Yes      Skip to S4  
 02 No

S3. Who would be the best person for us to speak with in your organization about the IRS?

[Record name and number. Thank and terminate call. Whether transferred or calling the new number, begin again with SCREENER INTRODUCTION using new name.]

S4. Before we continue, are you an IRS SPEC employee?

- 01 Yes  
 02 No      Skip to S6

S5. While your name was on the contact list, we are not interviewing IRS SPEC employees, but representatives from its partner organizations. We apologize for the inconvenience. Do you know of someone else at **[INSERT ORGANIZATION]** who would be more appropriate to give us this feedback?

[Record name and number. Thank and terminate call. Whether transferred or calling the new number, begin again with INTRODUCTION using new name.]

[If a Pre-Notification **E-mail** message was sent      Continue with S6]  
 [If a Pre-Notification **Letter** was sent              Skip to S7]

S6. You may recall an e-mail invitation from the IRS that asked for your participation in a web-based survey. The overall goal of the research is to help the IRS provide better service and improve the relationship between IRS SPEC and your organization. Although the web survey is closed, we are now following up by telephone with those who did not respond. Would you be willing to participate in this survey? It will only take about 15 to 20 minutes to complete.

- |                 |   |
|-----------------|---|
| 01 Yes          | Skip to INTRODUCTION                                |
| 02 Soft refusal | Schedule new date and time—ensure correct time zone |
| 03 Hard refusal | Thank you and terminate call                        |

[INTERVIEWER: Do not provide the web survey as an option. If the respondent insists on taking the web survey, you may provide them login/password and terminate call.]

S7. You may recall a letter from the IRS that invited you to participate in a telephone survey. The overall goal of the research is to help the IRS provide better service and improve the relationship between IRS SPEC and your organization. Would you be willing to participate in this survey? It will only take about 15 to 20 minutes to complete.

- |                 |   |
|-----------------|---|
| 01 Yes          |   |
| 02 Soft refusal | Schedule new date and time—ensure correct time zone |
| 04 Hard refusal | Thank you and terminate call                        |

## I. Introduction

Thank you. Please, feel free to be open and frank with us. Your identity and individual responses will be held confidential by ORC Macro, and your feedback will be provided to the IRS in aggregate only. Please keep in mind that this discussion will only be about your opinions of your experiences with IRS SPEC and not with any interactions you may have had with other parts of the IRS. Your responses are important in helping the IRS understand what makes a partnership successful. Throughout the rest of this survey, “you” refers to your organization—that is, either to you as a partner or to your coalition. The first set of questions pertains to the nature of your relationship with IRS SPEC and the customers you serve.

## II. Market Segments and Outreach Statistics

Q1. What is your primary area of emphasis as an organization? Again, we’re interested in the scope of emphasis of the organization you represent, which may be broader than your personal area of emphasis. (Read list and check all that apply) [Probe: Any others?]

- 01 Military Volunteer Income Tax Assistance, or MVITA
- 02 Volunteer Income Tax Assistance, or VITA
- 03 Education and Outreach, such as communications, products, news articles, or websites
- 04 Tax Counseling for the Elderly, or Non-AARP TCE
- 05 AARP
- 06 Asset Building, such as financial education, funding, or wealth building
- 07 Something else (Specify)
- 08 [DK]
- 09 [Refused]

- Q2. Which of the following types of customers do you serve most frequently? (Read list and check all that apply)
- 01 Low Income—less than \$39,000—English speaking
  - 02 Low Income—less than \$39,000—Non-English speaking
  - 03 Elderly
  - 04 Military
  - 05 People with disabilities
  - 06 Foreign students
  - 07 U.S.-based students
  - 08 Rural
  - 09 Native American
  - 10 Something else (Specify)
  - 98 [DK]
  - 99 [Refused]
- Q3. For how many years have you provided return preparation, outreach, education, or other tax assistance as an IRS SPEC partner?
- \_\_\_\_\_ years
- 98 [DK]
  - 99 [Refused]
- Q4. Approximately how many customers do you serve through your return preparation, outreach, or other tax-assistance programs per year? (Read list)
- 01 Fewer than 50
  - 02 50 to 100
  - 03 101 to 1000
  - 04 1001 to 2500
  - 05 More than 2500
  - 08 [DK]
  - 09 [Refused]
- Q5. Approximately how many volunteers or staff, including employees, do you coordinate to provide return preparation, outreach, or other tax assistance per year? (Read list)
- 01 1 to 10
  - 02 11-50
  - 03 51-100
  - 04 101-500
  - 05 More than 500
  - 08 [DK]
  - 09 [Refused]
- Q6. Are you an affiliate of a national organization that has a national-level partnership agreement with the IRS?
- 01 Yes
  - 02 No
  - 08 [DK]
  - 09 [Refused]

### III. Relationship Manager

Now I would like to ask you about your overall satisfaction with the relationship between you and IRS SPEC personnel with whom you have interacted. When considering your experience, please use a scale of 1 to 5 where 5 means very satisfied and 1 means very dissatisfied. Throughout the survey, if an item is not applicable or if you have no experience with it, or you are unaware the product/service is available, please let me know.

Q7. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with your IRS relationship manager's [Read and rotate A-M]

- A. Courtesy and professionalism
- B. Accessibility to you
- C. Proactiveness or anticipation of your needs
- D. Flexibility in meeting your needs
- E. Responsiveness to your concerns, questions, and suggestions
- F. Acknowledgement of barriers or problems
- G. Timely communication with you
- H. Adherence to security and privacy standards

05 Very satisfied

04

03

02

01 Very dissatisfied

06 [Not applicable/Have not used/No experience]

07 [Unaware product/service was available]

08 [DK]

09 [Refused]

Q8. Did your relationship manager provide you with results of your accomplishments and/or help you assess the impact of your program?

01 Yes

02 No

08 [DK]

09 [Refused]

Q9. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with the guidance and assistance you received from IRS SPEC regarding...? [Read and rotate A-K]

- A. Developing volunteer recruitment strategies
- B. Your selection of tax return preparation site locations—for example, what cities are in need of VITA sites
- C. Reaching your target customers
- D. Locating equipment through other sources
- E. Reviewing or assisting with your training plans
- F. Reviewing your training products
- G. Reviewing or assisting with your marketing plans, such as advertising site locations, services, and outreach events, the solicitation of volunteers, etc.

- H. Reviewing your marketing products such as brochures or envelope stuffers
- I. Reviewing or assisting with your outreach and education plans
- J. Reviewing your educational products
- K. Identifying community-based organizations as potential partners
- L. Establishing partnerships with community-based organizations
- M. Sharing tax-related information by providing articles, newsletters, links, etc.

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q10. Overall, [repeat scale if necessary] how satisfied are you with your IRS relationship manager?

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

[if Q6 = 01                      Continue]  
 [if Q6 = 02,08,09            Skip to Section V]

**IV. Relationship Management**

Q11. On a scale of 1 to 5, where 5 means very satisfied and 1 means very dissatisfied, how satisfied are you with...? [Read and rotate A-C]

- A. IRS SPEC's communication of national partner agreements down to local IRS field offices
- B. IRS SPEC's success in building relationships between you and local IRS offices
- C. The communication between you and local IRS field offices
- D. The training you receive

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q12. Do you feel that the services promised under your national partner agreements are being provided successfully by the local IRS field offices? Would you say yes, sometimes, or no?

- 01 Yes
- 02 Sometimes
- 03 No
- 08 [DK]
- 09 [Refused]

[if Q12 = 02,03]

Q13. How could the IRS better create national partner agreements that can be implemented successfully at the local level?

[Record verbatim]

[If Q1 = 01,02,04,05,07,08,09

Continue]

[If Q1 = 03,06 only

Skip to Section VII]

## V. Tax Law Training

Now I would like to ask you about your satisfaction with a number of IRS services and materials. As before, please indicate if an item is not applicable for you or your organization, if you have no experience with it, or you are unaware the product/service is available.

Q14. Does your partnership or coalition use tax law training materials or services provided by the IRS?

- 01 Yes
- 02 No Skip to Section VII
- 08 [DK] Skip to Section VII
- 09 [Refused] Skip to Section VII

Q15. Thinking only about the **tax law** training service provided by the IRS, on a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with [Read and rotate A-F]

- A. Availability of IRS staff to support your training needs
- B. The timeliness of the notification for training
- C. The timeliness of the training delivery
- D. The method of training delivery meeting your organization's needs (online, classroom, self-study)
- E. The IRS trainer's tax law knowledge
- F. The IRS trainer's teaching ability

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]

09 [Refused]

Q16. Overall, how satisfied are you with tax law training service provided by the IRS?

05 Very satisfied

04

03

02

01 Very dissatisfied

06 [Not applicable/Have not used/No experience]

07 [Unaware product/service was available]

08 [DK]

09 [Refused]

## VI. IRS Training Materials

Q17. Next, we'll move on to IRS-provided materials that you used for tax law training. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with [Read and rotate A-E]

A. The timeliness in the delivery of the tax law training materials

B. The content of the tax law training materials

C. The tax law training Facilitator's Guide—also known as Publication 1155

D. Web course titled "Link and Learn Taxes"

E. Volunteer Resource Guide—also known as the VITA/TCE Spiral bound Reference Guide or Publication 4012

Q18. Overall, how satisfied are you with the tax law training materials provided by the IRS?

05 Very satisfied

04

03

02

01 Very dissatisfied

06 [Not applicable/Have not used/No experience]

07 [Unaware product/service was available]

08 [DK]

09 [Refused]

## VII. Research

Now I have a few questions about the research, statistics, and databases provided by the IRS.

Q19. Have you used IRS-provided research, such as EITC related statistics, databases, maps, reports, or tables?

01 Yes

02 No Skip to Section VIII

08 [DK] Skip to Section VIII

09 [Refused] Skip to Section VIII

Q20. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with the following types of IRS-provided research? If you have not used these or are not aware of them, please let me know.

Read and rotate A-E]

- A. EITC related statistics
- B. Information on target market segments, such as Low Income, Limited English, Rural, Disabled, Elderly, etc
- C. IRS SPEC Tax Return Filing databases such as the SPEC Returns Database or SPEC EITC Database)
- D. IRS-provided maps
- E. IRS-provided reports

05 Very satisfied

04

03

02

01 Very dissatisfied

06 [Not applicable/Have not used/No experience]

07 [Unaware product/service was available]

08 [DK]

09 [Refused]

Q21. Did you receive the information in a timely manner?

01 Yes

02 No

08 [DK]

09 [Refused]

Q22. What was the impact of the IRS-provided research on your organization?

(Read list and check all that apply) [Probe: Any others?]

01 Allowed assessment of outreach or return preparation activities on communities served

02 Provided information for developing a volunteer recruitment strategy

03 Provided information for funding or grant requests

04 Helped determine locations for return preparation sites

05 Identified communities for outreach

07 Something else (Specify)

08 [DK]

09 [Refused]

[If Q1 = 01,02,04,05,07,08,09 Continue]

[If Q1 = 03,06 only Skip to Section IX]

### VIII. E-filing and Other Products

I'd now like to ask you to rate your satisfaction with a number of additional IRS products and materials. Again, please indicate if an item is not applicable for you or your organization, or if you have no experience with it, or you are unaware the product/service is available.



Q23. Do you file returns electronically?

- 01 Yes
- 02 No           Skip to Section IX
- 08 [DK]
- 09 [Refused]

Q24. First, let's talk about E-filing products. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with [Read and rotate C-E only]

- A. TaxWise electronic filing software desktop product
- B. TaxWise electronic filing software online product
- C. UTS Customer Support Line for TaxWise Software support
- D. Handbook and Supplement on e-filing and error correction—also known as Publications 1345 and 1345A
- E. E-file Administrator Guide—also known as TaxWise Publication 3189

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q25. Now, let me ask about two other IRS resources. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with [Read and rotate A-B]

- A. The Tax Law volunteer hotline
- B. IRS.gov Partner Resource web page

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

[If Q1 = 01,02,04,05 only           Skip to Section X]

[If Q1 = 03,06,07,08,09           Continue]

## IX. Marketing Products and Materials

Q26 Next, let's talk about IRS marketing products and materials. Once again, please indicate if an item is not applicable for you or your organization, if you have no experience with it, or weren't aware of this product. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with...? [Do not rotate]

- A. Your Money Matters brochures
- B. Living and Working with Disabilities brochures
- C. Birth through Childhood English brochures
- D. Birth through Childhood Spanish brochures
- E. Tax Guide for the Retiree: Frequently Asked Questions
- F. Child Tax Credit brochures or stuffers

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q27. In general, do you receive marketing materials when expected—for example, Lifecycle and Child Tax Credit brochures?

- 01 Yes
- 02 No
- 08 [DK]
- 09 [Refused]

Q28. Overall, how satisfied are you with the marketing products and materials provided by the IRS?

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

The next set of products relate to the Earned Income Tax Credit or EITC.

Q29. Are you aware that the IRS offers EITC marketing materials such as brochures or posters?

- 01 Yes
- 02 No           Skip to Section X
- 08 [DK]       Skip to Section X
- 09 [Refused]   Skip to Section X

Q30. Have you used any EITC marketing materials to assist you in your efforts to provide education and outreach, tax preparation and/or asset building efforts?

- 01 Yes
- 02 No           Skip to Section X
- 08 [DK]       Skip to Section X
- 09 [Refused]   Skip to Section X

- Q31. Please rate your satisfaction with IRS provided EITC marketing products and materials. Once again, please indicate if an item is not applicable for you or your organization, if you have no experience with it, or weren't aware of this product. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with [Do not rotate]
- A. The EITC marketing material content meeting your organizational needs
  - B. The EITC Spanish marketing materials
- 05 Very satisfied
  - 04
  - 03
  - 02
  - 01 Very dissatisfied
  - 06 [Not applicable/Have not used/No experience]
  - 07 [Unaware product/service was available]
  - 08 [DK]
  - 09 [Refused]
- Q32. In general, do you receive the EITC marketing materials when expected—for example, EITC brochures, stuffers, and posters?
- 01 Yes
  - 02 No
  - 08 [DK]
  - 09 [Refused]
- Q33. How satisfied are you with the following methods for acquiring EITC information?
- A. Accessing EITC area on irs.gov
  - B. EITC publications, forms, brochures
  - C. EITC online resources, such as the SPEC Partner toolkit
- 05 Very satisfied
  - 04
  - 03
  - 02
  - 01 Very dissatisfied
  - 06 [Not applicable/Have not used/No experience]
  - 07 [Unaware product/service was available]
  - 08 [DK]
  - 09 [Refused]
- Q34. If we were to translate the EITC materials into a language other than Spanish, please indicate the extent of the need for EITC materials in each of the following languages. Do you have a great need, some need, or no need for EITC materials translated into...?
- A. Chinese, such as Mandarin or Cantonese
  - B. Vietnamese
  - C. Korean
  - D. Russian
  - E. Something else (please specify)

- 01 Greatest Need
- 02 Some need
- 03 No need
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q35. Does your organization have a need for EITC marketing materials in areas we do not currently offer?

- 01 Yes (Please explain)
- 02 No
- 08 [DK]
- 09 [Refused]

#### **X. Quality of Materials, Products, Services, and Training**

Q36. Considering your responses about materials, products, services, and training, on a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how do you rate the overall quality of IRS Products and Services?

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

[If Q1 = 01,02,04,05,07,08,09 Continue]  
 [If Q1 = 03,06 only Skip to Section XIII]

#### **XI. Privacy, Confidentiality and Security**

Next, I would like to ask for your feedback on the IRS's efforts to improve the privacy, confidentiality, and security procedures at return preparation sites.

Q37. Are you familiar with the IRS efforts to maintain and improve the privacy, security and confidentiality at return preparation sites?

- 01 Yes
- 02 No Skip to Section XII
- 08 [DK] Skip to Section XII
- 09 [Refused] Skip to Section XII

Q38. Did the IRS provide guidance material to assist with the privacy, confidentiality and security of taxpayer data including computers and laptops?

- 01 Yes
- 02 No

- 08 [DK]  
09 [Refused]

Q39. How easy is it for your organization to meet IRS recommendations regarding privacy, confidentiality, and security? Please use a scale of 1 to 5, with 5 being very easy and 1 being very difficult.

- 05 Very easy  
04  
03  
02  
01 Very difficult  
06 [Not applicable/Have not used/No experience]  
08 [DK]  
09 [Refused]

[if Q39 = 01, 02]

Q40. Why would you say that it is difficult?

[Record verbatim]

Q41. Overall, how satisfied are you with the IRS's efforts to improve the privacy, confidentiality, and security procedures at return preparation sites.

- 05 Very satisfied  
04  
03  
02  
01 Very dissatisfied  
06 [Not applicable/Have not used/No experience]  
07 [Unaware product/service was available]  
08 [DK]  
09 [Refused]

## XII. Quality Review Process

Now I would like to ask you about the IRS's Volunteer Return Preparation Program - Quality Improvement Process also known as VRPP-QIP.

Q42. Are you familiar with the IRS efforts to improve quality of return preparation?

- 01 Yes  
02 No           Skip to Section XIII  
08 [DK]       Skip to Section XIII  
09 [Refused]   Skip to Section XIII

Q43. Using the same satisfaction scale of 1 to 5, where 5 means very satisfied and 1 means very dissatisfied, how satisfied are you with the following products used to communicate and maintain the Volunteer Return Preparation Program - Quality Improvement Process? [read and rotate A-I]

- A. Intake & Interview Sheet— Form 13614  
B. Quality Review Checklist— Form 8158  
C. Important Tax Records envelope— Publication 730

- D. Volunteer Resource Guide— Publication 4012
- E. Quality Review Technique DVD/Video— Publication Number 4562
- F. Volunteer Coordinator's Handbook— Publication 1084
- G. Volunteer Summary report— Form 13206
- H. Volunteer Agreement— Form 13615
- I. SPEC Volunteer Site Information— Form 13715

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q44. Using the same scale [repeat as often as necessary], overall how satisfied are you with the guidance, tools, and support provided by the IRS to improve the Volunteer Return Preparation Program - Quality Improvement Process?

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

### XIII. Overall Satisfaction and Partner Loyalty

Q45. We've talked about the service you have received from IRS SPEC staff, including the relationship between you and the IRS SPEC staff, products, training, outreach, education, and research. Considering all of your responses to this survey, we'd like you to rate your overall satisfaction with IRS SPEC's products and services. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, are you...?

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q46. What, if any, suggestions do you have for IRS SPEC to improve their products or services?

[Record verbatim]

Q47. Given your experience, on a scale of 1 to 5 with 5 being very likely and 1 being very unlikely, how likely are you to continue partnering with IRS SPEC next year?

- 05 Very likely
- 04
- 03
- 02
- 01 Very unlikely
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

[If Q47 = 01,02]

Q48. What is the main reason you are relatively unlikely to continue partnering with IRS next year?

[Record verbatim]

Q49. Let's say another organization similar to yours was considering partnering with IRS SPEC for taxpayer assistance services and products. Given your experience, on a scale of 1 to 5, where 5 means very likely and 1 means very unlikely, how likely would you be to recommend IRS SPEC to them?

- 05 Very likely
- 04
- 03
- 02
- 01 Very unlikely
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q50. What services provided by SPEC do you value most?

[Record verbatim]

#### XIV. Resource Needs

Q51. We're almost completed with the survey. We'd like to know what your greatest resource needs are. Using a rating scale of 1 to 5, where 5 means very important and 1 means not important at all, how important is it that IRS SPEC assist you with the following items: [Do not rotate]

- A. Assisting with marketing plans
- B. Reviewing marketing materials
- C. Reviewing training courses or materials
- D. Identifying potential partners (other organizations to work with)
- E. Building a coalition or network of partners
- F. Providing research or informational data

- 05 Very important

- 04
- 03
- 02
- 01 Not important at all
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

**XV. Closing Comments**

Q52. Do you have any other positive comments or suggestions for improvement for the IRS SPEC program?

[Record verbatim]

That concludes this survey. On behalf of the IRS and ORC Macro, thank you very much for your participation.

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding the study. The OMB number for this study is 1545-1432. If you have any comments regarding this study, please write to: IRS, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Avenue, NW, Washington, DC 20224



**IN DATABASE: DO NOT ASK**

NAME

ORGANIZATION

ORGANIZATION CHANNEL

- a. Educational Institution /Government Agency
- b. Financial Institution Partnerships
- c. Volunteer and Community/Large Employer

RELATIONSHIP MANAGER

**Scheduling Phone Appointment**

Hello, my name is **[CALLER NAME]** calling from ORC Macro on behalf of IRS's Stakeholder Partnerships, Education, and Communication (SPEC) organization. We are working with the IRS's SPEC program to obtain feedback about your satisfaction as a National Partner who works with the SPEC program on joint national initiatives and coalition building.

N1. Could I speak to **[INSERT NAME]**?

- 01 Yes (Named person)
- 02 No (Not named person) Skip to N3

N2. Are you the person at **[INSERT ORGANIZATION]** who manages or interacts with the IRS SPEC program, who could best provide us with candid feedback about the IRS SPEC program?

- 01 Yes (Skip to S1)
- 02 No

N3. Who would be the best person for us to speak with in your organization about this?

[Record name and number. Thank and terminate call. Whether transferred or calling the new number, begin again with SCREENER INTRODUCTION using new name.]

S1. I'm calling today to schedule a time that would be convenient for you to speak with an interviewer from ORC Macro. The interview will take about 15 minutes to complete. Is there a time that you have available during the next week or so?

- 01 Yes (Schedule date and time—ensure correct time zone)
- 02 Soft refusal (Set time to call back to schedule interview)
- 03 Hard refusal (Thank you and terminate call)

Interviewer may provide if asked:

- The overall goal of the research is to gather information that will help the IRS provide better service and improve the relationship between IRS SPEC and your organization.
- During the past couple weeks, you should have received a letter signed by the Director of the IRS SPEC program, Ellie Cigmalia, notifying you that we would be giving you a call.
- At this time, we are just scheduling the interview, not conducting the survey. We will conduct the interview at the time you propose.

**Terminate Scheduling Call**

Thank you for your willingness to share your feedback with the IRS. We look forward to speaking with you at **[REPEAT DATE/TIME]**.

## Introduction

Hello, my name is **[CALLER NAME]** calling from ORC Macro on behalf of IRS's Stakeholder Partnerships, Education, and Communication (SPEC) organization.

C1. Am I speaking with **[INSERT NAME]**?

- 01 Yes (Named person)
- 02 No (Not named person)      Ask to be connected

C2. Great. As you may recall when we contacted you to set up this call, ORC Macro is working with the IRS's SPEC program to obtain feedback about your satisfaction as a National Partner who works with SPEC on joint national initiatives and coalition building. We had scheduled this time for a 15-minute interview to gather your feedback for the IRS. May I assume that this still a good time?

- 01 Yes
- 02 No (schedule new date and time—ensure correct time zone))
- 03 Soft refusal (Thank you and terminate call)
- 04 Hard refusal (Thank you and terminate call)

Interviewer may provide if asked:

- The overall goal of the research is to gather information that will help the IRS provide better service and improve the relationship between IRS SPEC and your organization.
- During the past couple weeks, you should have received a letter to you signed by the Director of the IRS SPEC program, Ellie Cigmalia, notifying you that we would be giving you a call.

Thank you. Please, feel free to be open and frank with us. Your identity and individual responses will be held confidential by ORC Macro, and your feedback will be provided to the IRS in aggregate only. Please keep in mind that this discussion will only be about your opinions of your experiences with the SPEC National Partnership program and not with any interactions you may have had with other parts of the IRS.

RM1. According to our files, your primary SPEC relationship manager is **(RM NAME)**. Is that correct?

- 01 Yes            (Skip to Q1)
- 02 No            (Continue with RM2)
- 08 [DK]        (Skip to Q1)
- 09 [Refused]   Skip to Q1

RM2. Who is your primary SPEC relationship manager?

[Record verbatim]

## I. Market Segments And Outreach Statistics

Let me start by asking some general questions.

Q1. Which of the following are your primary areas of emphasis as a national partner? Again, we want to know the roles you play at the national level, not the roles of your local affiliates. (Read list and check all that apply) [Probe: Any others?]

- 01 Return Preparation, such as volunteer assistance, facilities, or equipment
- 02 Education and Outreach, such as communications, products, news articles, or websites
- 03 Asset Building, such as financial education, funding, or wealth building
- 04 Other Tax Assistance
- 08 [DK]
- 09 [Refused]

Q2. Which of the following types of customers do you, your affiliates, or members serve most frequently? (Read list and check all that apply)

- 01 Low Income—less than \$39,000—English speaking
- 02 Low Income—less than \$39,000—Non-English speaking
- 03 Elderly
- 04 Military
- 05 People with disabilities
- 06 Foreign students
- 07 U.S.-based students
- 08 Rural
- 09 Native American
- 10 Something else (Specify)
- 98 [DK]
- 99 [Refused]

Q3. For how many years has your organization partnered with the IRS?

\_\_\_\_\_ years

- 98 [DK]
- 99 [Refused]

Q4. Which of the following reasons best describe why your organization continues to partner with the IRS? (Read List and check all that apply)

- 01 To benefit from IRS's tax law knowledge
- 02 To benefit from related mission and goals
- 03 To benefit from the range of IRS provided products and services
- 04 To provide a value added service to the community
- 05 To make a greater economic impact on the community
- 06 As an opportunity to move families toward self-sufficiency
- 07 Something else (please specify) \_\_\_\_\_
- 08 [DK]
- 09 [Refused]

## II. Relationship Management

Now I would like to ask you about your satisfaction with the relationship between you and the IRS SPEC relationship manager you work with. Please think of your direct experience with the SPEC relationship manager only, not about your other experiences with SPEC or your local affiliates' or members' experiences dealing with their local IRS offices.

Please use a scale of 1 to 5 where 5 means very satisfied and 1 means very dissatisfied. If an item is not applicable or if you have no experience with it, please let me know.

Q6. How satisfied are you with the relationship manager's...? [read and rotate A-N]

- A. Courtesy and professionalism
- B. Accessibility to you
- C. Proactiveness or anticipation of your needs
- D. Flexibility in meeting your needs
- E. Responsiveness to your concerns, questions, and suggestions
- F. Acknowledgement of barriers or problems
- G. Timely communication with you
- H. Adherence to security and privacy standards
- I. Understanding your mission
- J. Ability to fulfill the IRS partnership agreements with you

05 Very satisfied

04

03

02

01 Very dissatisfied

06 [Not applicable/Have not used/No experience]

07 [Unaware product/service was available]

08 [DK]

09 [Refused]

Q7. Did your relationship manager provide you with results of your accomplishments and/or help you assess the impact of your program?

01 Yes

02 No

08 [DK]

09 [Refused]

Q8. Using the same scale [repeat as often as necessary], how satisfied are you with the guidance and assistance that you receive from the relationship manager in...? [read and rotate]

- A. Developing Volunteer recruitment strategies
- B. Your selection of tax return preparation site locations—for example, what cities are in need of VITA sites
- C. Reaching your target customers
- D. Identifying community based organizations as potential partners
- E. Establishing partnerships with community based organizations
- F. Sharing valuable tax information by providing articles, newsletters, links, etc.

05 Very satisfied

04

03

02

01 Very dissatisfied

06 [Not applicable/Have not used/No experience]

- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q9. Using the same scale [repeat as often as necessary], how satisfied are you with the guidance and assistance that you receive from the relationship manager at national conferences, conventions, or meetings?

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

[If Q9 = 1 to 5 only]

Q10. What in particular about the Relationship Manager's presence at national conferences, conventions and meetings influenced your satisfaction level?

[Record verbatim]

Q11. Using the same scale [repeat as often as necessary], overall, how satisfied are you with your national partnership relationship manager?

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

### III. Relationship Building

Q12. Are your affiliates or members involved in your IRS partnerships?

- 01 Yes
- 02 No           Skip to Q17
- 08 [DK]        Skip to Q17
- 09 [Refused]   Skip to Q17

Q13. Has IRS SPEC worked with you to connect your affiliates or members to IRS local offices in an effort to facilitate collaboration?

- 01 Yes
- 02 No           Skip to Q17
- 08 [DK]        Skip to Q17
- 09 [Refused]   Skip to Q17

Q14. On a scale of 1 to 5, where 5 means very satisfied and 1 means very dissatisfied, how satisfied are you with...? [Read and rotate A-C]

- A. IRS SPEC's communication of national partner agreements down to local IRS field offices
- B. IRS SPEC's success in building relationships between your local affiliates or members and local IRS offices
- C. The communication between your local affiliates or members and local IRS field offices
- D. The training your local affiliates or members receive

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q15. Do you feel that the services promised under your national partner agreements are being provided successfully by the local IRS field offices? Would you say yes, sometimes, or no?

- 01 Yes           Skip to Q17
- 02 Sometimes
- 03 No
- 08 [DK]         Skip to Q17
- 09 [Refused]   Skip to Q17

Q16. How could the IRS better create national partner agreements that can be implemented successfully at the local level?

[Record verbatim]

**IV. Research**

Now I have a few questions about the research, statistics, and databases that the IRS provides.

Q17. Have you received and used IRS-provided research, such as EITC related statistics, databases, maps, reports, or tables?

- 01 Yes
- 02 No           Skip to Q21
- 08 [DK]
- 09 [Refused]

Q18. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with the following types of IRS-provided research? [Read and rotate A-E]

- A. EITC related statistics
- B. Information on target market segments, such as Low Income, Limited English, Rural, Disabled, Elderly, etc
- C. SPEC Tax Return Filing databases, such as SPEC Returns Database, SPEC EITC Database
- D. IRS-provided maps
- E. IRS-provided reports

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q19. Did you receive the information in a timely manner?

- 01 Yes
- 02 No
- 08 [DK]
- 09 [Refused]

Q20. What was the impact of the IRS provided research on your organization?  
(Read list and check all that apply) [Probe: Any others?]

- 01 Allowed assessment of outreach or return preparation activities on communities served
- 02 Provided information for developing a volunteer recruitment strategy
- 03 Provided information for funding or grant requests
- 04 Helped determine locations for return preparation sites
- 05 Identified communities for outreach
- 07 Something else (Specify)
- 08 [DK]
- 09 [Refused]

[If Q1 = 01 Continue]  
[If Q1 = 02, 03, 04, 08, 09 only Skip to Q26]

**V. Privacy, Confidentiality and Security**

Next, I would like to ask for your feedback on the IRS's efforts to improve the privacy, confidentiality, and security procedures at return preparation sites.

Q21. Are you familiar with the IRS efforts to maintain and improve the privacy, security and confidentiality at return preparation sites?

- 01 Yes
- 02 No Skip to Q26
- 08 [DK] Skip to Q26
- 09 [Refused] Skip to Q26

Q22. Did the IRS provide guidance material to assist with the privacy, confidentiality and security of taxpayer data including computers and laptops?

- 01 Yes
- 02 No
- 08 [DK]
- 09 [Refused]

Q23. How easy is it for your organization to meet IRS recommendations regarding privacy, confidentiality, and security? Please use a scale of 1 to 5, with 5 being very easy and 1 being very difficult.

- 05 Very easy
- 04
- 03
- 02
- 01 Very difficult
- 06 [Not applicable/Have not used/No experience]
- 08 [DK]
- 09 [Refused]

[if Q23 = 01, 02]

Q24. Why would you say that it is difficult?

[Record verbatim]

Q25. Overall, how satisfied are you with the IRS's efforts to improve the privacy, confidentiality, and security procedures at return preparation sites.

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

## VI. Quality Review Process

Now I would like to ask you about the IRS's Volunteer Return Preparation Program - Quality Improvement Process also known as VRPP-QIP.

Q26. Are you familiar with the IRS efforts to improve quality of return preparation?

- 01 Yes
- 02 No           Skip to Q29
- 08 [DK]        Skip to Q29
- 09 [Refused]   Skip to Q29

Q27. Using the same satisfaction scale of 1 to 5, where 5 means very satisfied and 1 means very dissatisfied, how satisfied are you with the following products used to communicate



and maintain the Volunteer Return Preparation Program - Quality Improvement Process?  
[read and rotate A-I]

- A. Intake & Interview Sheet— Form 13614
- B. Quality Review Checklist— Form 8158
- C. Important Tax Records envelope— Publication 730
- D. Volunteer Resource Guide— Publication 4012
- E. Quality Review Technique DVD/Video— Publication Number 4562
- F. Volunteer Coordinator's Handbook— Publication 1084
- G. Volunteer Summary report— Form 13206
- H. Volunteer Agreement— Form 13615
- I. SPEC Volunteer Site Information— Form 13715

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q28. Using the same scale [repeat as often as necessary], overall how satisfied are you with the guidance, tools, and support provided by the IRS to improve the Volunteer Return Preparation Program - Quality Improvement Process?

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

## VII. Overall Satisfaction And Loyalty

Q29. We've talked about the service you have received from the IRS SPEC program, and, we'd like you to rate your overall satisfaction with SPEC on a scale of 1 to 5, where 5 means very satisfied and 1 means very dissatisfied?

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q30. Given your experience, on a scale of 1 to 5, where 5 means very satisfied and 1 means very dissatisfied, how likely are you to continue partnering with IRS next year?

- 05 Very likely
- 04
- 03
- 02
- 01 Very unlikely
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

[If Q30 = 1 or 2]

Q31. What is the main reason you are relatively unlikely to continue partnering with IRS next year?

[Record verbatim]

Q32. Let's say another organization similar to yours was considering partnering with IRS SPEC for taxpayer assistance services and products. Given your experience, on a scale of 1 to 5, where 5 means very satisfied and 1 means very dissatisfied, how likely would you be to recommend IRS SPEC to them?

- 05 Very likely
- 04
- 03
- 02
- 01 Very unlikely
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q33. What services provided by SPEC do you value most?

[record verbatim]

## VI. Closing Comments

Q34. Do you have any other positive comments or suggestions for improvement for the IRS SPEC program?

[record verbatim]

That concludes this survey. On behalf of the IRS and ORC Macro, thank you very much for your participation. The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding the study. The OMB number for this study is 1545-1432. If you have any comments regarding this study, please write to: IRS, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Avenue, NW, Washington, DC 20224

**IRS LOGO/LETTERHEAD/ENVELOPE**

Name  
Address  
City, State, Zip

Dear [Name]:

You are receiving this letter because your organization is a local partner of the IRS through the Stakeholder Partnerships, Education, and Communication (SPEC) program. Over the next couple weeks, you will receive an e-mail or letter from ORC Macro, a survey research and consulting firm, on behalf of IRS SPEC. They will ask you to complete a web survey to obtain your candid feedback about the products and services you receive from SPEC.

When ORC Macro contacts you, please take a few moments to complete the survey online. The survey should take only about 20 minutes. Your participation in this survey is critical so that we can improve our product and service offerings to local partners. ORC Macro will hold your identity confidential and will provide your answers to the IRS without your name or other identifying information.

If you have any questions, please contact Ron Deaett, Role, at 404-525-4214 or your relationship manager.

Sincerely,

IRS Sponsor Name  
Stakeholder Partnerships, Education, and Communication Program

Dear Andrew:

I am sending you this email to ask for your help in improving the IRS's Stakeholder Partnerships, Education, and Communication (SPEC) Program. We have hired ORC Macro, an independent company, to administer a web survey to the representatives who have local partnerships with SPEC. In about a week, you will receive an email from ORC Macro that will contain a link to the survey with instructions. You will be asked to evaluate your partnership experience with SPEC. The survey should take about 15 minutes.

ORC Macro will hold your identity confidential. ORC Macro will provide your answers to the IRS without your name or other identifying information. Your participation in this survey is critical so that we can improve our customer service for local partners who use SPEC services and products. Your cooperation in answering these questions will help to ensure that partners like you receive fair, courteous, and timely service.

I am committed to improving IRS' service with every partner. Please help me in this effort by providing ORC Macro with your candid feedback.

*If you do not want to be contacted or if you have any questions about this study, please call ORC Macro at the following **toll-free phone number**. 1-800-216-8108.*

Sincerely,

Nina E. Olson  
Stakeholder Partnerships, Education, and Communication Program

OMB control number: 1545-1432

Name  
Address  
City, State, Zip

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