

## Initial Questions for IRS Feedback Survey

**1. What type of organization do you represent?**

- A. Charitable
- B. Church or religious
- C. Educational
- D. Other—please list \_\_\_\_\_

**2. What is your role in this organization?**

- A. Officer (e.g., Director or Treasurer)
- B. Board Member
- C. Staff Member
- D. Independent Contractor
- E. Volunteer
- F. Other—please list \_\_\_\_\_

**3. What other resources have you used to obtain information on 501(c)(3) organizations?**

- A. Face-to-face training course
- B. IRS website
- C. Written publications
- D. Other—please list \_\_\_\_\_

**4. How would you rate the training overall?**

- A. Very Effective
- B. Effective
- C. Neither Effective Nor Ineffective
- D. Ineffective
- E. Very Ineffective

**5. Which module have you just completed?**

- A. Course 1: Introduction to 501 Tax Exemption
- B. Course 2: Unrelated Business Income
- C. Course 3: Employment-Related Tax Issues
- D. Course 4: Form 990
- E. Course 5: Required Disclosures

[Module selection launches the appropriate table.]

**Course 1**

**Introduction to 501(c)(3) Tax Exemption**

In the table below, please indicate the effectiveness of Course 1: "Introduction to 501(c)(3) Tax Exemption."

How effective was this course in helping you to ...

**a. Identify the benefits of Section 501(c)(3) tax-exempt status?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**b. Understand the distinction between tax-exempt and nonprofit organizations?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**c. Identify the activities, other than Unrelated Business Income (UBI), that can jeopardize 501(c)(3) tax-exempt status, and how to avoid them?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**d. Identify the major categories of public charities?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**e. Understand the advanced ruling process?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**In the space below, please provide any additional information you believe would help improve this course.**

**Course 2**  
**Unrelated Business Income**

In the table below, please indicate the effectiveness of Course 2: "Unrelated Business Income."

How effective was this course in helping you to ...

**a. Understand and apply the three parts of the UBI test?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**b. Identify the types of activities that commonly generate UBI?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**c. Identify the exceptions and modifications to UBI?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**d. Identify charitable gaming activities?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**e. Identify the form used to report UBI?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**In the space below, please provide any additional information you believe would help improve this course.**

**Course 3**  
**Employment-Related Tax Issues**

In the table below, please indicate the effectiveness of Course 3: "Employment-Related Tax Issues."

How effective was this course in helping you to ...

**a. Classify workers as employees or independent contractors?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**b. Determine which employment tax forms to use for employees?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**c. Determine which employment tax forms to use for independent contractors?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**In the space below, please provide any additional information you believe would help improve this course.**

**Course 4  
Form 990**

In the table below, please indicate the effectiveness of Course 4: "Form 990."

How effective was this course in helping you to ...

**a. Identify the records required to complete Form 990?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**b. Understand the general purpose of Form 990?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**c. Identify who must file Form 990?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**d. Understand what must be reported on major sections of Form 990?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**e. Learn how to avoid common errors?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**f. Understand the types of audits and the audit process?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**In the space below, please provide any additional information you believe would help improve this course.**

**Course 5  
Required Disclosures**

In the table below, please indicate the effectiveness of Course 5: "Required Disclosures."

How effective was this course in helping you to ...

**a. Identify the public inspection rules?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**b. Identify the substantiation rules for quid pro quo contributions?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**c. Identify the substantiation rules for non-quid pro quo contributions?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**d. Identify other disclosure rules applicable to 501(c)(3) organizations?**

Very Ineffective	Ineffective	Neither Effective Nor Ineffective	Effective	Very Effective
1	2	3	4	5

**In the space below, please provide any additional information you believe would help improve this course.**