



2009 ETA Marketing FGs Among Tax Preparers SCREENER

RESPONDENT INFO

RESPONDENT ID# _____ (1-5)

THIS SCREENER TO BE USED WITH RECRUITS IN THE FOLLOWING 4 STATES:

- New York Group 1: DATE & TIME AND SEGMENT TBD.....1 ...09
New York Group 2: DATE & TIME AND SEGMENT TBD.....2
North Carolina Group 1: DATE & TIME AND SEGMENT TBD.....3
North Carolina Group 2: DATE & TIME AND SEGMENT TBD.....4
Illinois Group 1: DATE & TIME AND SEGMENT TBD.....5
Illinois Group 2: DATE & TIME AND SEGMENT TBD.....6
Texas Group 1: DATE & TIME AND SEGMENT TBD.....7
Texas Group 2: DATE & TIME AND SEGMENT TBD.....8

CITY _____ ST _____ ZIP _____

PHONE # (AC-____) _____

RECORD DATE, TIME & DISPOSITION FOR EACH ATTEMPT AT SCREENING/RECRUITING THIS PERSON.

Table with 10 rows and 7 columns: DATE, TIME, (am) (pm), Disc, NA, Unavail, Ref, NO, Comp. Includes row numbers 1-10 and corresponding attempt numbers.

INTERVIEWER _____

AFTER REACHING A POTENTIAL PARTICIPANT ON THE IRS-PROVIDED INITIAL SCREENING LIST, INTRODUCE YOURSELF:

Hello, I am _____ of Russell Research, an independent national survey research firm. The Internal Revenue Service has asked us to contact selected tax professionals in your area about participation in a research study. Let me assure you this is not a sales call. The survey is voluntary and will take 2 minutes of your time. Will you take a moment to speak with me? (IF RESPONDENT AGREES TO PARTICIPATE CONTINUE WITH...)

First, some questions about you and possible participation in this study.

1. For the record, are you male or female? (CIRCLE ANSWER BELOW.)

- Male..... 1
Female..... 2

2. Which of the following best describes your age? (CIRCLE ANSWER BELOW AND REPORT AGE SPREAD TO PROJECT DIRECTORS FOR MONITORING. WE DO NOT WANT AGE TO SKEW TOO STRONGLY TOWARD HIGHER RANGES.)

- 18-35..... 1
36-55..... 2
56-69..... 3
70 Or Over (DO NOT RECRUIT MORE THAN TWO 70+ PER GROUP). 4
(DO NOT READ, BUT CIRCLE IF:) Refused.....y

NOTE: TO QUALIFY, PARTICIPANTS MUST BE: (1) Preparers Of 100+ Returns; (2) Preparers Who e-File From 1% To 49.9% Of Their Total # Of Returns; AND FIT INTO AT LEAST ONE OF THE KEY SEGMENTS OF E-I-T-H-E-R (3a) Enrolled Agents, (3b) NATP Members, (3c) CPAs, OR (3d) Non-Professionally Affiliated Tax Preparers.

CRITERIA (1), (2), (3a), and (3c) CAN BE IDENTIFIED IN THE IRS DATABASE, LEAVING ONLY Q3 SCREENING NEEDED IN ORDER TO FULLY QUALIFY PARTICIPANTS INTO ONE OF THE FOUR KEY SEGMENTS:

3. I'm going to read a list of some different tax-related trade or professional organizations. Please tell me if you are a member of any of these organizations. (READ LIST & CIRCLE ANSWER.)

AARP Tax Aide.....	1	...23
American Association Of Attorneys--CPAs - or AAACPA.....	2	
American Institute Of CPAs - or AICPA.....	3	
American Payroll Association - or APA.....	4	
Association Of Payroll Management - or ASPM.....	5	
Council for Electronic Revenue Communication Advancement - or CERCA.....	6	
Federation Of Tax Administrators - or NFTA.....	7	
National Association Of Tax Practitioners - or NATP.....	8	
National Society Of Accountants - or NSA.....	9	
National Association Of Enrolled Agents - or NAEA.....	1	...24
National Center For Professional Education - or NCPE.....	2	
National Association Of Computerized Tax Processors - or NACTP.....	3	
If You're A Member Of <u>Some Other Organization</u> , Please Name It (SPECIFY) _____	x	

If You Do Not Belong To Any Tax-Related Trade Or Professional Organization, Please Say So

RECRUITMENT PRECEDENCE:

- **IF "ENROLLED AGENT" OR "CPA" FROM IRS LIST, CLASSIFY INTO ONE OF THOSE APPROPRIATE SEGMENTS.**
- **IF NOT EITHER OF THOSE, BUT RESPONSE ABOVE IS "NATIONAL ASSOCIATION OF TAX PRACTITIONERS/NATP", CLASSIFY INTO THE "NATP MEMBER" SEGMENT.**
- **IF NOT ANY OF THE FIRST THREE SEGMENTS, BUT RESPONSE ABOVE IS "DO NOT BELONG TO ANY...", CLASSIFY INTO "NON-PROFESSIONALLY ALIGNED TAX PREPARERS".**
- **IF QUALIFIED FOR A SPECIFIC SEGMENT PER MARKET/AREA, CIRCLE THE SEGMENT BELOW AND THEN CONTINUE TO PARTICIPATION OFFER. (FOR ALL OTHER RESPONDENTS, THANK AND TERM.)**

RESPONDENT QUALIFIED FOR:

Enrolled Agents (AREA, GROUP # AND DATE & TIME TBD).....	1
NATP Members (AREA, GROUP # AND DATE & TIME TBD).....	2
CPAs (AREA, GROUP # AND DATE & TIME TBD).....	3
Non-Professionally Affiliated Tax Preparers (AREA, GROUP # AND DATE & TIME TBD).....	4

PARTICIPATION OFFER: We'd like you to join us, along with other tax professionals, in a group discussion of tax filing and marketing approaches which the IRS might use in communicating with tax professionals. To participate, you would come to our research facilities at (ADDRESS) on (DATE) at (TIME) and spend about an hour and a half with us, discussing these matters. Your participation is voluntary, and as a thank you for taking the time to help us, we'll have a \$125 cash gift for you at the end of the group discussion. Will you join us?

Yes (CONTINUE WITH INFORMATIONAL QUESTIONS ON NEXT PAGE).....	1
No (THANK AND TERM).....	2

4. In advance of the group discussion, let me ask a few more questions so we can profile attendees at the discussion. First, how many years you have been involved in the tax profession - is that...? (READ CHOICES & CIRCLE ONLY ONE ANSWER BELOW.)

- 1-4 years..... 1
- 5-9 years..... 2
- 10-19 years..... 3
- 20-29 years..... 4
- 30 years or more..... 5

5. When you do tax preparation work, do you work alone as an independent, do you work with a firm or do you work both as an independent and with a firm? (CIRCLE ANSWER BELOW.)

- Work Alone As An Independent (SKIP TO "CLOSING COMMENTS")..... 1
- Work With A Firm (CONTINUE WITH Qs 6-7-8)..... 2
- Both As An Independent & With A Firm (CONTINUE WITH Qs 6-7-8)..... 3

6. (IF "WORK WITH A FIRM" OR "BOTH AS AN INDEPENDENT & WITH A FIRM" IN Q5, ASK:) In total, including yourself, how many people work for your firm at all of its locations in the U.S.? (READ CHOICES & CIRCLE ONLY ONE ANSWER BELOW.)

- 1-4..... 1
- 5-9..... 2
- 10-19..... 3
- 20-99..... 4
- 100-499..... 5
- 500-999..... 6
- 1,000 Or More..... 7
- (DON'T OFFER AS A CHOICE, BUT CIRCLE IF:) Don't Know..... y

7. (IF "WORK WITH A FIRM" OR "BOTH AS AN INDEPENDENT & WITH A FIRM" IN Q5, ASK:) To the best of your knowledge, please tell me how many active Tax Preparers work for your firm at all of its locations in the U.S.? (READ CHOICES & CIRCLE ONLY ONE ANSWER BELOW.)

- 1-4..... 1
- 5-9..... 2
- 10-19..... 3
- 20-99..... 4
- 100-499..... 5
- 500-999..... 6
- 1,000 Or More..... 7
- (DON'T OFFER AS A CHOICE, BUT CIRCLE IF:) Don't Know..... y

8. (IF "WORK WITH A FIRM" OR "BOTH AS AN INDEPENDENT & WITH A FIRM" IN Q5, ASK:) Which, if any, of the following best describes the type of firm you work with? (READ CHOICES & CIRCLE ONE ANSWER BELOW.)

- A National Firm Such As H&R Block or Jackson-Hewitt..... 1
- A Regional Firm With Offices In Several Cities/Areas But Not All Across The Country..... 2
- A Local Firm With Several Offices In Just One City/Area..... 3
- A Local Firm With Only One Office..... 4
- Some Other Type Of Firm (SPECIFY)..... y

CLOSING COMMENTS:

That's all the questions I have. Thank you for your time. We are required by law to report to you the OMB (Office Of Management and Budget) Control Number for this public information request. That number is 1545-1349. In addition, if you have any comments on ways to improve this research process, you can write to the IRS. Would you like the address? (IF YES, ADDRESS IS...) IRS Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.