

## 2008 W&I SPEC LOCAL PARTNER SURVEY

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### 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	

[The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the, Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.](#)

### SCREENER INTRODUCTION

Hello, my name is **[CALLER NAME]** calling from Macro International on behalf of IRS's Stakeholder Partnerships, Education, and Communication organization—you may know this organization as 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 SPEC to obtain feedback about your satisfaction as a local partner who works with SPEC on outreach, education, return preparation, and other tax assistance programs provided by SPEC. Are you the person at **[INSERT ORGANIZATION]** who manages or interacts with SPEC who could provide us with candid feedback about SPEC?

- 01 Yes      Skip to S4
- 02 No

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

[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.

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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 SPEC that asked for your participation in a web-based survey. The overall goal of the research is to help SPEC provide better service and improve the relationship between 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 SPEC that invited you to participate in a telephone survey. The overall goal of the research is to help SPEC provide better service and improve the relationship between 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

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### I. Introduction

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

### II. Market Segments and Demographics

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 **ONLY ONE**)

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- 01 Military Volunteer Income Tax Assistance
- 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, Non-AARP
- 05 Tax Counseling for the Elderly, 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 \$40,000
- 02 Elderly
- 03 Military
- 04 People with disabilities
- 05 Foreign students
- 06 U.S.-based students
- 07 Rural
- 08 Native American
- 09 Limited English Proficient
- 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 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

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- 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 SPEC?

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

### **III. Relationship Manager**

Now I would like to ask you about your satisfaction with the relationship between you and the SPEC relationship manager 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 SPEC relationship manager's [\[Read and rotate A-E\]](#)

- A. Courtesy and professionalism
- B. Proactiveness or anticipation of your needs
- C. Flexibility in meeting your needs
- D. Responsiveness to your concerns, questions, and suggestions
- E. Adherence to security and privacy standards

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

Q8. Did your SPEC 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 your SPEC relationship manager regarding...? [\[Read and rotate A-J\]](#)

- A. Your selection of tax return preparation site locations—for example, what cities are in need of VITA sites
- B. Reaching your target customers
- C. Locating equipment through other sources
- D. Reviewing or assisting with your training plans
- E. Reviewing or assisting with your marketing plans, such as advertising site locations, services, and outreach events, the solicitation of volunteers, etc.
- F. Reviewing your marketing products such as brochures or envelope stuffers
- G. Reviewing or assisting with your outreach and education plans
- H. Reviewing your educational products
- I. Identifying community-based organizations as potential partners
- J. Establishing partnerships with community-based organizations

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 SPEC relationship manager?

05 Very satisfied

04

03

02

01 Very dissatisfied

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

07 [DK]

09 [Refused]

[if Q6 = 01 Continue]

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

#### IV. Relationship Building

I'd now like to ask you to rate your satisfaction with the relationship between you, the local SPEC offices and your national organization. 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 items mentioned.

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-B]

- A. SPEC's success in building relationships between you and local SPEC relationship managers
- B. The communication between you and local SPEC relationship managers

- 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  
[If Q1 = 03, 06 only

Continue]  
Skip to Section VII]

## V. Tax Law Training

Now I would like to ask you about your satisfaction with the tax law training your volunteers received. 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.

Q12. How do the majority of the volunteers at your partnership or coalition receive tax law training? Would it be...? [read list]

- 1 Self Study
- 2 Training taught by volunteers (train the trainer)
- 3 Training taught by other partners
- 4 Training taught by SPEC staff
- 05 No training Skip to Section VII
- 08 [DK] Skip to Section VII
- 09 [Refused] Skip to Section VII

Q13. Thinking only about the **tax law** training your volunteers received, on a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with

A. Availability of SPEC training staff to support your training needs

[If Q12 = 04 Continue]  
[If Q12 = 01, 02, 03 Skip to Q14]

[Read and rotate B-E]

- B. The method of training delivery meeting your organization's needs
- C. The timeliness of the training delivery
- D. The trainer's tax law knowledge
- E. The trainer's teaching ability

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [DK]

09 [Refused]

Q14. Overall, how satisfied are you with tax law training service your volunteers received?

- 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. Training Materials

Q15. Next, we'll move on to SPEC -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

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

- 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 and databases provided by SPEC.

Q17. Have you used SPEC-provided research, such as databases, MapPoint Analysis, reports, return filing statistics or tables?

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

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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 SPEC-provided research? If you have not used these or are not aware of them, please let me know.

[Read and rotate A-E]

- A. Return filing related statistics, (such as on e-filing or EITC Returns)
- 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 or SPEC EITC Database)
- D. SPEC -provided MapPoint analysis
- E. SPEC -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]

Q18. What was the impact of SPEC 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 funding or grant requests

03 Helped determine locations for return preparation sites

04 Identified communities for outreach

05 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 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.

Q21. Do you file returns electronically?

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

Q22. 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 [\[Read and rotate C-D only\]](#)

- A. TaxWise electronic filing software desktop product
- B. TaxWise electronic filing software online product
- C. UTS Customer Support Line for TaxWise Software support
- D. 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]

Q23. Now, let me ask about two other resources. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with the Tax Law volunteer hotline

- 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]

## **IX. Community Network Pages**

Next, let's talk about the online resources available for partners at [WWW.IRS.GOV](http://WWW.IRS.GOV)

Q24 Are you aware of the Community Network web page on IRS.gov with information on products, training, quality and other partner support?

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

Q25 How often do you visit the Community Network pages on IRS.gov?

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- 01 Never      Skip to Section X
- 02 Once
- 02 Monthly
- 03 Weekly
- 04 Daily
- 08 [DK]      Skip to Section X
- 09 [Refused] Skip to Section X

Q26 How satisfied are you with the current information on the Community Network web pages on IRS.gov? If an item is not applicable to your organization; or if you have no experience with it; or you were not aware of this product, please choose: Not applicable/Have not used/No experience.

- A. Partner Products and Volunteer Resource Center
- B. How to Become an IRS Partner in Your Community
- C. Volunteer Tax Return Preparation - Training Scope and Products
- D. Volunteer in Your Community

- 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 From the list below, please select the one item where SPEC can provide information that would most improve the Community Network pages on IRS.gov? [\[Read 01-05\]](#)

- 01 Add information and resources for rural taxpayers
- 02 Add information and resources for Native American taxpayers
- 03 Add information and resources for Asset Building and Financial Literacy
- 04 Improve navigation and searching of the site to enhance locating relevant information
- 05 Other (Please specify)
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q28. Overall, how satisfied are you with the Community Network pages located on WWW.IRS.GOV?

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]

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

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

**X. Marketing Products and Materials**

Q29 Next, let's talk about 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 – Publication 3865
- B. Living and Working with Disabilities brochures – Publication 3966
- C. Birth through Childhood English brochures – Publication 4156
- D. Birth through Childhood Spanish brochures – Publication 4156SP

- 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. 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]

Q31. Overall, how satisfied are you with the marketing products and materials provided by SPEC?

- 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]

**XI. Quality of Materials, Products, Services, and Training**

Q32. 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 SPEC 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 XV]

**XII. Privacy, Confidentiality and Security**

Next, I would like to ask for your feedback on SPEC's efforts to improve the privacy, confidentiality, and security procedures at return preparation sites, as referenced in Publication 4299 – Privacy and Confidentiality - A Public Trust.

Q33. Are you familiar with SPEC's efforts to maintain and improve the privacy, security and confidentiality at return preparation sites?

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

Q34. Did SPEC provide guidance material to assist with the privacy, confidentiality and security of taxpayer data, including protection of data on computers and laptops?

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

Q35. Did you encounter any challenges in implementing SPEC's recommendations regarding privacy, confidentiality, and security?

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

[if Q35 = 01]

Q36. What challenges did you encounter?

[Record verbatim]

Q37. Overall, how satisfied are you with SPEC'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]

### XIII. Quality Improvement Process

Now I would like to ask you about SPEC's VITA/TCE – Volunteer Return Preparation Program - Quality Improvement Process, also known as VRPP-QIP.

Q38. Are you familiar with SPEC's efforts to improve the quality of returns prepared at VITA and TCE sites?

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

Q39. 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 developed to support the VRPP-QIP?

[If Q1 = 01,02,04,07,08,09       read and rotate A-H]  
[If Q1 = 05                        read and rotate B,D,E & H only]

- A. Intake & Interview Sheet— Form 13614
- B. Quality Review Sheet— Form 8158
- C. Volunteer Resource Guide— Publication 4012
- D. Quality Review Technique DVD/Video— Publication Number 4562
- E. Volunteer Site Coordinator's Handbook— Publication 1084
- F. Volunteer Summary Report— Form 13206
- G. Volunteer Agreement— Form 13615
- H. 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]

Q40. Did you encounter any challenges in implementing the VITA/TCE Quality Site Requirements?

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

[if Q40 = 01]

Q41. What challenges did you encounter?

[Record verbatim]

Q42 How satisfied are you with the explanation of the Quality Improvement Process provided by your SPEC 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 Q42 = 01 or 02]

Q.43 Why was the explanation unsatisfactory?

- 01 - No explanation of the Quality Improvement Process was provided
- 02 - Explanation was not complete
- 03 – I did not understand all of the requirements
- 04 – I had unanswered questions
- 05 - Other - [Record verbatim]

Q44. Using the same scale [repeat as often as necessary], overall how satisfied are you with the guidance, tools, and support provided by SPEC to improve the VITA/TCE Programs?

- 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]

**XIV. Overall Satisfaction**

Q45. We've talked about the service you have received from SPEC staff, including the relationship between you and 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 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 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 SPEC next year?

- 05 Very likely
- 04
- 03
- 02
- 01 Very unlikely
- 06 [DK]
- 09 [Refused]

[If Q47 = 01,02]

Q48. If you do not anticipate partnering with SPEC next year, what is the main reason you are relatively unlikely to continue?

[Record verbatim]

Q49. What services provided by SPEC do you value most?

[Record verbatim]

**XV. Resource Needs**

Q50. 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 SPEC assist you with the following items: [Do not rotate]

- A. Assisting with marketing plans
- B. Identifying potential partners (other organizations to work with)
- C. Building a coalition or network of partners
- D. 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]

**XVI. Closing Comments**

Q51. Do you have any other comments or suggestions for improvement for SPEC program?

[Record verbatim]  
01 No

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

You have just completed the SPEC portion of this survey. Now we would like you to answer a few questions about products created by the IRS National Earned Income Tax Credit (EITC) Office to promote awareness of the EITC.

**XVII. EITC Marketing Materials**

Q52. Are you familiar with EITC's marketing campaign slogan "I take Credit?"

- 01 Yes
- 02 No                      Skip to Q55
- 08 [DK]                      Skip to Q55
- 09 [Refused]                Skip to Q55

Q53. How satisfied are you that the "I Take Credit" campaign slogan meets your organizations needs?

- 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]

Q54. Do you have a suggestion for an EITC campaign slogan that would better meet your organizations needs? If you do please provide it



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- 01 Yes [PLEASE CAPTURE PARTNER SUGGESTION]
- 02 No Skip to Q55
- 08 [DK] Skip to Q55
- 09 [Refused] Skip to Q55

Q55. Are you aware that the IRS offers EITC marketing materials such as brochures or posters?

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

Q56. 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 End
- 08 [DK] Skip to End
- 09 [Refused] Skip to End

Q57. 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]

Q58. 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]

Q59. How satisfied are you with the following methods for acquiring EITC information?

- A. Accessing EITC area on IRS.GOV

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- 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]

Q60. How frequently do you visit the following EITC related online resources?

- A. EITC pages on [WWW.IRS.GOV/EITC](http://WWW.IRS.GOV/EITC)
- B. EITC Marketing Express on [WWW.IRSMARKETINGEXPRESS.COM](http://WWW.IRSMARKETINGEXPRESS.COM)
- C. EITC Assistant located on [WWW.IRS.GOV](http://WWW.IRS.GOV)
- D. Online Toolkit for SPEC Partners on [WWW.IRS-EITC.INFO/SPEC](http://WWW.IRS-EITC.INFO/SPEC)

- 05 Once Daily
- 04 Once Weekly
- 03 Once Monthly
- 02 Occasionally
- 01 Never
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

Q61. How satisfied are you with the following online resources related to the EITC meeting your organizations needs? On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with...

- A. EITC pages on [WWW.IRS.GOV/EITC](http://WWW.IRS.GOV/EITC)
- B. EITC Marketing Express on [WWW.IRSMARKETINGEXPRESS.COM](http://WWW.IRSMARKETINGEXPRESS.COM)
- C. EITC Assistant located on [WWW.IRS.GOV](http://WWW.IRS.GOV)
- D. Online Toolkit for SPEC Partners on [WWW.IRS-EITC.INFO/SPEC](http://WWW.IRS-EITC.INFO/SPEC)

- 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]

Q62. How satisfied were you with the ease of finding EITC related information on the EITC pages located on [WWW.IRS.GOV/EITC](http://WWW.IRS.GOV/EITC)?

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- 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]

**XVIII. Close**

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