

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

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.

Scheduling Phone Appointment

N1. Hello, my name is **[CALLER NAME]** calling from Macro International Inc. on behalf of IRS's Stakeholder Partnerships, Education, and Communication (SPEC) organization. We are working with the 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. Could I speak to **[INSERT NAME]**?

- 01 Yes (Named person)
- 02 No (Person no longer works there or wrong name) Skip to N3

N2. Are you the person at **[INSERT ORGANIZATION]** who manages or interacts with the SPEC program, who could best provide us with candid feedback about the 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, bring 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 Macro International Inc. 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 Complete interview now Skip to RM1
- 03 Soft refusal (Set time to call back to schedule interview)
- 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 SPEC provide better service and improve the relationship between SPEC and your organization.
- During the past couple weeks, you should have received a letter signed by the Director of the SPEC program, Julie Garcia, 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 SPEC. 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. Repeat C1.

C2. Great. As you may recall when we contacted you to set up this call, Macro International Inc. is working with the 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 SPEC. 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 SPEC provide better service and improve the relationship between SPEC and your organization.
- During the past couple weeks, you should have received a letter to you signed by the Director of the SPEC program, Julie Garcia, 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 Macro International Inc., and your feedback will be provided to SPEC 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 Demographics

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 \$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 has your organization partnered with SPEC?

____ years

- 98 [DK]
- 99 [Refused]

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

- 01 To benefit from SPEC's tax law knowledge
- 02 To benefit from related mission and goals
- 03 To benefit from the range of SPEC-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 Manager

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

Q5. How satisfied are you with your SPEC relationship manager's...? [read and rotate A-G]

- 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
- F. Understanding your mission
- G. Ability to fulfill SPEC partnership agreements with you

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

Q6. 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]

Q7. Using the same scale [repeat as often as necessary], how satisfied are you with the guidance and assistance that you receive from your SPEC relationship manager in...?
[read and rotate A-D]

- 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. Identifying community based organizations as potential partners
- D. 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]

Q8. Using the same scale [repeat as often as necessary], how satisfied are you with the guidance and assistance that you receive from your SPEC 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 Q8 = 1 to 5 only]

Q9. What in particular about your SPEC relationship manager's presence at national conferences, conventions and meetings influenced your satisfaction level?

[Record verbatim]

Q10. Using the same scale [repeat as often as necessary], overall, how satisfied are you with your national partner SPEC relationship manager?

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

III. Relationship Building

Q11. Do you have local affiliates that partner with SPEC?

- 01 Yes
- 02 No Skip to Q15

- 08 [DK] Skip to Q15
- 09 [Refused] Skip to Q15

Q12. Has SPEC worked with you to connect your affiliates or members to SPEC local relationship managers in an effort to facilitate collaboration?

- 01 Yes
- 02 No Skip to Q15
- 08 [DK] Skip to Q15
- 09 [Refused] Skip to Q15

Q13. 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 communication of national partner agreements down to local SPEC relationship managers
- B. SPEC's success in building relationships between your local affiliates or members 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]

Q14. How could SPEC better create national partner agreements that you can implement successfully with your local affiliates?

[Record verbatim]

IV. Research

Now I have a few questions about the research and databases that SPEC provides.

Q15. Have you received and used SPEC-provided research, such as databases, MapPoint Analysis reports, return filing statistics or tables?

- 01 Yes
- 02 No Skip to Q19
- 08 [DK] Skip to Q19
- 09 [Refused] Skip to Q19

Q16. 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? [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, 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]

Q17. 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 Continue]
[If Q1 = 02, 03, 04, 08, 09 only Skip to Q24]

V. 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, as referenced in Publication 4299 – Privacy and Confidentiality - A Public Trust, at return preparation sites.

Q19. 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 Q22
- 08 [DK] Skip to Q22
- 09 [Refused] Skip to Q22

Q20. 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]

Q21. 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]

VI. Quality Review Process

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

Q22. Are you familiar with SPEC's efforts to improve quality of return preparation?

- 01 Yes
- 02 No Skip to Q24
- 08 [DK] Skip to Q24
- 09 [Refused] Skip to Q24

Q23. 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 VRPP-QIP?

- 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

Q24. We've talked about the service you have received from SPEC. 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 [DK]
- 09 [Refused]

Q25. 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 SPEC next year?

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

[If Q25 = 1 or 2]

Q26. If you do not anticipate partnering with SPEC next year, what is the main reason you are relatively unlikely to continue?

[Record verbatim]

Q27. What services provided by SPEC do you value most?

[Record verbatim]

VI. Closing Comments

Q28. Do you have any other comments or suggestions for improvement for the SPEC program?

[Record verbatim]

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