

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. 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

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**)

- 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]

[if Q1 = 06 Continue]

[if Q1 = 01,02,03,04,05,07,08, Skip to Q2]

Q1A. Which financial education and/or asset building services do you provide for the clients you serve? (Check all that apply)

- 01 Banking: Low Cost Checking/Savings
- 02 Credit Counseling/Repair/Score
- 03 Individual Development Accounts (IDAs)
- 04 Financial Education or Asset Building Workshops
- 05 Consumer Protection/Identity Theft
- 06 Foreclosure Assistance or Debt Relief
- 07 Other Tax Assistance (e.g. ITIN's, Notices, Payment Arrangements)
- 08 Other (Capture Verbatim)

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 \$42,000
- 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 provided return preparation, outreach, education, or other tax assistance as an SPEC partner?

___ years

- 98 [DK]
- 99 [Refused]

Q3A. For how many years have you represented your organization in providing 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
- 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-D](#))

- 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

- 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-I]

- 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. Reviewing or assisting with your training plans
- D. Reviewing or assisting with your marketing plans, such as advertising site locations, services, and outreach events, etc.
- E. Reviewing your marketing products such as brochures or envelope stuffers
- F. Reviewing or assisting with your outreach and education plans
- G. Reviewing your educational products
- H. Identifying community-based organizations as potential partners
- I. 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 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 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. Web course titled "Link and Learn Taxes"
- B. Process Based Training, Publication 4491
- C. Volunteer Resource Guide—also known as the VITA/TCE Spiral bound Reference Guide or Publication 4012
- D. The Volunteer Assistor's Test/Retest Form 6744
- E. The tax law training Facilitator's Guide—also known as Publication 4455

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](#)

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]

Q20. 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]

VIII. E-filing and Other Products

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

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?

- 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. CCH 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

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

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

- 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 partners who serve rural taxpayers
- 02 Add information and resources for partners who serve Native American taxpayers
- 03 Add information and resources pertaining to 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]
- 07 [Unaware product/service was available]
- 08 [DK]
- 09 [Refused]

X. Marketing Products and Materials

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

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. Economic Stimulus Payment – Publication 4665
- 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. Privacy, Confidentiality and Security

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

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.

Q32. 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 XII
- 08 [DK] Skip to Section XII
- 09 [Refused] Skip to Section XII

Q33. Did SPEC provide guidance material to assist with the privacy, confidentiality and security of taxpayer data, including Section 7216 disclosure and use consent requirements?

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

Q34. Did you encounter any challenges in implementing Section 7216 disclosure and use consent requirements?

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

[if Q34 = 01]

Q35. What challenges did you encounter?

[Record verbatim]

Q36. 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]

XII. 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.

Q37. 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 XIII
- 08 [DK] Skip to Section XIII
- 09 [Refused] Skip to Section XIII

Q38. 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 13614C
- 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]

Q39. Did you encounter any challenges in implementing the VITA/TCE Quality Site Requirements?

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

[if Q39 = 01]

Q40. What challenges did you encounter?

[Record verbatim]

Q41 How satisfied are you with discussions with your SPEC Relationship Manager concerning Quality Site Requirements?

- 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 Q41 = 01 or 02]

Q.42 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]

Q43. 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]

XIII. Overall Satisfaction

Q44. 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]

Q45. What, if any, suggestions do you have for SPEC to improve their products or services?

[Record verbatim]

Q46. 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 Q46 = 01,02]

Q47. If you do not anticipate partnering with SPEC next year, what is the main reason you are relatively unlikely to continue?

[Record verbatim]

Q48. What services provided by SPEC do you value most?

[Record verbatim]

XIV. Resource Needs

Q49. 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]

XV. Closing Comments

Q50. 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 XVII]

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.

XVI. EITC Marketing Materials

Q51. Are you familiar with EITC's marketing campaign slogan "Life's Easier with EITC"?

- 01 Yes
- 02 No Skip to Q53
- 08 [DK] Skip to Q53
- 09 [Refused] Skip to Q53

Q52. Do you have a suggestion for an EITC campaign slogan that would better meet your organizations needs? If you do please provide it

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

Q53. Have you used the following EITC marketing materials to assist you in your efforts to provide education and outreach, tax preparation and/or asset building efforts?

- A. Publication 4559 – EITC Sell Sheet – lists all EITC products and descriptions
- B. Publication 962 series – Stuffers in English, Spanish and evergreen with EITC basic eligibility requirements.
- C. Publication 3211 – Bilingual Q&A EITC brochure used to answer most common questions relating to EITC.
- D. Publication 4298 – Bus card displayed on public transportation vehicles to market three IRS programs to taxpayers: EITC, Child Tax Credit, and e-File.
- E. Publication 4194 – Bilingual reference poster listing EITC requirements and most common EITC errors.
- F. Publication 3524 series – EITC eligibility checklist in both English and Spanish
- G. Publication 1235 – Brochure for taxpayers who could be eligible for Advance Earned Income Tax Credit (AEITC). English on one side, Spanish on the other.
- H. Other IRS provided EITC publications.
- I. EITC publications not provided by the IRS.

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

Q54. Are there any other products that you would like to see developed for EITC outreach?

- 01 Yes [Record verbatim]
- 02 No

Q55. What languages in addition to Spanish would be beneficial for your EITC outreach efforts?

- 01 Yes [Record verbatim]
- 02 No

Q56. How frequently do you visit the following EITC related online resources?

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

[Programmer: Q56A, 56B, 56C, and 56D are to be treated as independent questions. All four questions are to be asked. Skip patterns for each of these four questions determine ONLY whether the corresponding item within Q57 will be asked or not.]

[If Q56A = 02,03,04,05 Ask Q57A]
[If Q56A = 01,07,08,09 Do not ask Q57A]

[If Q56B = 02,03,04,05 Ask Q57B]
[If Q56B = 01,07,08,09 Do not ask Q57B]

[If Q56C = 02,03,04,05 Ask Q57C]
[If Q56C = 01,07,08,09 Do not ask Q57C]

[If Q56D = 02,03,04,05 Ask Q57D]
[If Q56D = 01,07,08,09 Do not ask Q57D]

Q57. 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
- B. EITC Marketing Express on WWW.IRSMARKETINGEXPRESS.COM
- C. EITC Assistant located on WWW.IRS.GOV
- D. Online Toolkit for SPEC Partners on 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]

[If Q56A OR Q56C = 02,03,04,05
[If Q56A AND Q56C = 01,07,08,09

Continue]
Skip to End]

Q58. How satisfied were you with the ease of finding EITC related information on the EITC pages located on WWW.IRS.GOV/EITC?

- 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]

XVII. Close

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

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, 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 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, 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 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 \$42,000—English speaking
- 02 Low Income—less than \$42,000—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 Limited English Proficient
- 11 Something else (Specify)
- 98 [DK]
- 99 [Refused]

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

____ years

- 98 [DK]
- 99 [Refused]

Q3A. For how many years have you represented your organization in partnering 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-J]

- E. Courtesy and professionalism
- F. Proactiveness or anticipation of your needs
- G. Flexibility in meeting your needs
- H. Responsiveness to your concerns, questions, and suggestions
- I. Understanding your mission
- J. 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-F]

- 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 Q16
- 08 [DK] Skip to Q16
- 09 [Refused] Skip to Q16

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 Q16
- 08 [DK] Skip to Q16
- 09 [Refused] Skip to Q16

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-C]

- C. SPEC's communication of national partner agreements down to local SPEC relationship managers
- D. SPEC's success in building relationships between your local affiliates or members and local SPEC relationship managers
- E. The communication 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 Q20
- 08 [DK] Skip to Q20
- 09 [Refused] Skip to Q20

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]

- F. Return filing related statistics, (such as on e-filing or EITC Returns)
- G. Information on target market segments, such as Low Income, Limited English, Rural, Disabled, Elderly, etc

- H. SPEC Tax Return Filing databases (such as SPEC Returns Database, SPEC EITC Database)
- I. SPEC-provided MapPoint analysis
- J. 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 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 Q27]

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 Q25
- 08 [DK] Skip to Q25
- 09 [Refused] Skip to Q25

Q20. Did SPEC provide guidance material to assist with the privacy, confidentiality and security of taxpayer data, including Section 7216 disclosure and use consent requirements?

- 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 Q27
- 08 [DK] Skip to Q27
- 09 [Refused] Skip to Q27

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.