

Attachment A- Draft- LITC Clients' Survey

Your participation in this 10 minute voluntary survey is very important to us. Your feedback will help us improve our service to you. Please answer each question below by completely filling in the bubble “o” next to your selection. Purpose of the Survey: The IRS Multilingual Initiative Strategy Office (MLI) is interviewing the clients of the Low Income Tax Clinics (LITC) to determine if IRS products and services provided to Limited English Proficient (LEP) taxpayers are meeting their needs, and to ascertain if additional products/services are required to meet their needs.

1. What is your Zip Code?
(_____)

2. What is your country of origin?
(_____)

3. Please indicate the primary language you speak at home?
(_____)

4. How well do you understand the written language, you primarily speak at home.
 Very well
 Well
 Not well
 Not at all

5. How well do you speak English?
 Very well
 Well
 Not well
 Not at all

6. How well do you understand the written English language?
 Very well
 Well
 Not well
 Not at all

7. In which language do you prefer to conduct written business?
(_____)

8. Did you file a tax return last year?
 Yes
 No

9. Who prepared your tax return last year?
 Self
 Family or friends
 Volunteer assisted community center
 IRS tax assistance center
 Paid Tax Preparer

10. If you filed a tax return last year, which form did you use?
 1040EZ (*income tax return for single and joint filers with no dependents*)
 1040A (*individual income tax return, with taxable income < \$100,000 and no itemized deductions*)
 1040 (*individual income tax return*)
 Other (_____)

11. Which of the following schedules did you file with your tax return?
- Schedule A (*itemized deductions*)
 - Schedule B (*interest and ordinary dividends*)
 - Schedule C (*profit or loss from business/ sole proprietorship*)
 - None of the above
12. Which of the following IRS products/services are you aware of? (Choose all that apply)
- IRS forms and instruction booklets
 - Foreign Language translation of IRS forms and instruction booklets
 - IRS Over the Phone Interpreter
 - IRS website (www.irs.gov)
 - Spanish IRS website (www.irs.gov/espanol)
 - IRS walk-in office
13. Which of the following IRS products/services did you use in completing your tax return? (Choose all that apply)
- IRS forms and instruction booklets
 - Foreign Language translation of IRS forms and instruction booklets
 - IRS website (www.irs.gov)
 - Automated IRS phone system
 - Free File
 - E-File
 - IRS Over the Phone Interpreter
 - Other (_____)
14. How do you use the IRS website (www.irs.gov)? (Choose all that apply)
- Download tax forms and publications
 - Access tax law information
 - Obtain IRS information in foreign languages (_____)
 - Unaware of Website
 - Don't use
15. If you use the IRS website, (www.irs.gov), to obtain tax information, how organized is the information on the website to obtain the desired tax products and services?
- Very well
 - Well
 - Not well
 - Not at all
 - Did not use
16. What additional information would you want to have on the IRS website (www.irs.gov), and in which foreign languages?
- Please comment:
17. Where do you obtain tax law information?
- Post Office
 - Public Library
 - Volunteer assisted community center
 - IRS tax assistance center
 - IRS web-site
 - Paid Tax Preparer
 - Low Income Tax Clinic (LITC)
 - Other (_____)

18. Which of the following forms/schedules would you want translated into the language you prefer to use when conducting written business?

(Choose all that apply)

- a. 1040EZ (*income tax return for single and joint filers with no dependents*)
- b. 1040A (*individual income tax return, with taxable income < \$100,000 and no*
- c. *itemized deductions*)
- d. 1040 (*individual income tax return*)
- e. Schedule A (*itemized deductions*)
- f. Schedule B (*interest and ordinary dividends*)
- g. Schedule C (*profit or loss from business/ sole proprietorship*)
- h. Other (_____)

19. What additional services would you want the IRS to provide for limited English proficient (LEP) clients?

Please comment:

Paperwork Reduction Act Notice

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 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.

Attachment B
Internal Revenue Service (IRS)
Limited English Proficient (LEP) Customer Survey
INSTRUCTIONS & RECORDATION SHEET

Purpose:

This survey is being conducted by the IRS Multilingual Strategy Office to assess the communication, product, and service needs of limited English proficient (LEP) taxpayers who speak a language other than English as their primary language and have difficulty speaking and understanding English. The survey is intended to identify trends, issues, and problems of LEP taxpayers in meeting their tax responsibilities. Results from this survey will be used to develop recommendations for improvement to products and services provided to LEP persons and those who assist them.

Background:

Executive Order (E.O.) 13166 requires federal agencies to provide meaningful access to Limited English Proficient (LEP) persons. To accomplish this, the E.O. requires assessment of communication, product, and service needs of LEP populations regularly encountered. In both 2003 and 2005, MLI conducted needs assessment of LEP taxpayers. These focused on Spanish LEP taxpayers. A major goal of the current assessment is to re-evaluate the LEP needs, and to ascertain if there is a need to expand IRS products/service offerings in foreign languages other than Spanish, such as Vietnamese, Chinese, Korean and Russian.

General Instructions

- Surveys will be administered January 15, 2009 through March 31, 2009.
- Each site is requested to obtain a total of 50 surveys from LEP speaking persons.
- Administer at least 25 surveys between January 15, 2009 and February 28, 2009 and 25 between March 1, 2009 and March 31, 2009 to reach the targeted goal of 50 surveys per site. *Surveys should be spread over the administration time of January 15- March 31.*
- Ask eligible clients if they are willing to take a 10 minute voluntary survey.
- Provide a numerical count of clients not willing to participate in the voluntary survey each month.
- Ensure that all questions are answered and that the bubble “●” next to the selections are completely filled in. *This is a scan-able survey and the scanner does not read bubbles that are marked with a check or marked with an “⊗”*
- Enclosed is a recordation sheet to use in forwarding the completed surveys.
- Completed surveys and the recordation sheet, including the count of clients not willing to participate must be sent in three shipments, by February 10, by March 10, and by April 10. Receiving the surveys over time will assist us in processing the surveys.
- Any surveys not completed should be returned with the final shipment.
- Mail completed surveys to:

IRS
Wage and Investment Division
Mail Stop 96-WI
401 W. Peachtree St. NW
Atlanta, GA 30308-3510

Site Coordinator

Please assign one individual to be the site coordinator. The site coordinator will be the link between IRS and your office concerning survey administration. They are responsible for mailing the consolidated recordation sheet. If there are survey administration changes that occur, we will notify the Site Coordinator via e-mail. Please provide the coordinator's contact information (name, address, email address, and phone number) by email to Ciyata.D.Coleman@irs.gov or by telephone to Ciyata Coleman at (404) 338-8725 upon receipt of this package.

Selecting Participants

Please select only those participants who:

- Speak English either not well or not at all (has difficulty speaking and/or understanding English)
- Has filed a tax return in the last three years
- Are over 18 years of age

Questions

If you have any other questions, please call Ciyata Coleman (404) 338-8725 or Miles Cooper (404-338-8068).

Thank you in advance for your participation

**Internal Revenue Service (IRS)
 Limited English Proficient (LEP) Customer Survey
 RECORDATION SHEET**

Please complete this sheet and submit with your completed surveys to:

IRS

Wage and Investment Division
 Mail Stop 96-WI
 401 W. Peachtree St. NW
 Atlanta, GA 30308-3510

SITE INFORMATION: Name: _____
 Address: _____

PLEASE CHECK: ___LITC ___VITA ___TCE ___Other_____

SITE COORDINATOR: Name_____

 E-Mail Address_____

 Address (if different from above) _____

Date	Number of Surveys Submitted	Clients not-willing to Participate
February 10		
March 10		
April 10		
TOTAL		