

# SPEC Partner National Partner Survey

**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

**Scheduling Phone Appointment**

N1. Hello, my name is **[CALLER NAME]** calling from ICF Macro 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 ICF Macro. 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.
- [USE THIS INFORMATION ONLY WITH THE PERSON ON THE ORIGINAL CALL LIST. DO NOT USE WITH ANYONE ELSE YOU MAY BE REFERRED TO WITHIN THE SAME ORGANIZATION.] About a month ago, you should have received an email signed by the Director of the SPEC program, Julie Garcia, inviting you to participate in this survey that we would be conducting via the Web. We did not receive a response to the email invitations that were sent out over the last few weeks. We understand you are busy and may have overlooked it. We are hoping that you will be able to complete the brief survey with us over the phone. It will only take a few minutes.
- 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 ICF 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, ICF Macro 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.

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Thank you. Please, feel free to be open and frank with us. Your identity and individual responses will be held private to the extent permitted by law by ICF Macro, 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 \$49,000
- 03 Elderly
- 04 Military
- 05 People with disabilities
- 08 Rural
- 09 American Indian or Alaska Native
- 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]

Q4. For how many years have you represented your organization in partnering with SPEC?

\_\_\_\_ years

- 98 [DK]
- 99 [Refused]

Q5. 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.

Q6. How satisfied are you with your SPEC relationship manager's...? [\[read and rotate A-F\]](#)

- 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. Understanding your mission
- F. 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]

Q7. 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]

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 in...? [\[read and rotate A-D\]](#)

- A. Identification of cities for a possible VITA site or program which would potentially benefit your affiliates.
- B. Reaching your target customers
- C. Identifying and establishing partnerships with community based organizationsSPEC-provided research, such as databases, MapPoint Analysis, reports, return filing statistics or tables
- D.

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]

Q9. 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]
- A.
- B. [If Q9 = 01 to 05 only]
- C.

D. Q10. What in particular about your SPEC relationship manager’s presence at national conferences, conventions and meetings influenced your satisfaction level?

[Record verbatim]

Q11. 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**

Q12. 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

Q13. 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

Q14. 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]

- 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
- C. 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]

Q15. How could SPEC better create national partner agreements that you can implement successfully with your local affiliates?

[Record verbatim]

**IV. Overall Satisfaction**

Q16. 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]

Q16A. Thinking about your overall satisfaction with SPEC last year, would you say this year you are more satisfied, less satisfied, or that your overall satisfaction has remained about the same? If this is your first year working with SPEC, please choose “Not Applicable”.

- 05 More satisfied
- 04 Remained about the same
- 03 Less satisfied
- 06 [Not applicable/Have not used/No experience]

///ASK IF Q16A=05///

Q16B. Why do you say you are more satisfied overall with SPEC this year compared to last year?

[Record verbatim]

///ASK IF Q20A=03///

Q16C. Why do you say you are less satisfied overall with SPEC this year compared to last year?

[Record verbatim]

Q17. Given your experience, on a scale of 1 to 5, where 5 means very likely and 1 means 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 Q17 = 01 or 02]

Q18. If you do not anticipate partnering with SPEC next year, what is the main reason you are relatively unlikely to continue?

[Record verbatim]

Q19. What services provided by SPEC do you value most?

[Record verbatim]

## **VI. Closing Comments**

Q20. 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 ICF Macro, thank you very much for your participation.

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.



# SPEC Partner National Partner Survey Pre- Notification Letter

From: [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com)

To: [National Partner E-Mail address]

Subject: 2010 IRS SPEC Partner Satisfaction Survey

Dear [Name]:

You are receiving this e-mail because your organization is an IRS Stakeholder Partnerships, Education, and Communication (SPEC) national partner. During the next couple of weeks, you will receive another email from ICF Macro, a survey research and consulting firm. That email will invite you to complete a brief web survey to provide your candid feedback about the products and services you receive from SPEC.

This year's survey questions have been revised to include items related to SPEC initiatives and our changing business environment. Based on feedback from partners surveyed in the past, the time for this year's survey has been significantly reduced.

Capturing your feedback is very important to the IRS. Your participation in this survey is critical so that we can improve our products and services to all of our local partners. ICF Macro will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. Your feedback will be provided to the IRS in aggregate only.

If you have any questions, please contact Ron Smith, Chief, Strategic Planning & Development, at (404) 338-8512 or your IRS relationship manager.

Thank you in advance for your participation.

Julieta D. Garcia  
Director, Stakeholder Partnerships, Education and Communication

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.

# SPEC Partner National Partner Survey Initial Invitation

From: [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com)

To: [e-mail address]

Subject: 2010 IRS SPEC Partner Satisfaction Survey

Dear IRS SPEC Partner:

The IRS office of Stakeholder Partnerships, Education, and Communication (SPEC) is asking you, as one of their valued national partners, to help them determine where to focus their attention in 2010/2011. To do this, we invite you to participate in the 2010 SPEC Partner Satisfaction Survey. This web-based survey can be easily completed over the internet at your convenience. Your participation will help SPEC direct their efforts and resources to the programs needing them the most.

ICF Macro, an independent consulting firm, is administering this survey via the Internet. ICF Macro will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. Your feedback will be provided to the IRS in aggregate only.

The survey is located on the Internet at [\[Hyperlink\]](#)

The survey should take less than 15 minutes.

You can access the survey from any computer that has Internet access by clicking on the above Internet address or by copying the Internet address into your browser. The web address above includes a password that will enable you to exit the survey and re-enter at a later time. It will also protect any data you have entered if you experience any computer disruptions. ICF Macro will not share these passwords with the IRS at any time during or after this study.

Please complete this survey no later than Friday, March 26, 2010. If you have any questions about the survey administration or are having problems accessing the survey, please contact Sherri Settle at ICF Macro at [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com) or 1-888-285-7976.

If you have any general questions about the nature of the study, please contact Ron Smith, Chief, Strategic Planning & Development, at (404) 338-8512 or [Ron.Smith@irs.gov](mailto:Ron.Smith@irs.gov).

Thank you in advance for your participation.

John Hurley  
Project Director  
ICF Macro

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.

# SPEC Partner National Partner Survey First Reminder

From: [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com)

To: [e-mail address]

Subject: Reminder: 2010 IRS SPEC Partner Satisfaction Survey

Dear IRS SPEC Partner:

Recently you should have received an e-mail message from ICF Macro asking for your participation in the 2010 SPEC Partner Satisfaction Survey. To ensure that the findings represent the views of all SPEC partners, we urge you to take a few minutes to complete the survey. The final cut-off date is Friday, March 26, 2010. If you have already completed the survey, thank you for your participation.

The survey is located on the Internet at [\[Hyperlink\]](#)

The survey should take less than 15 minutes.

You can access the survey from any computer that has Internet access by clicking on the above Internet address or by copying the Internet address into your browser. The web address above includes a password that will enable you to exit the survey and re-enter at a later time. It will also protect any data you have entered if you experience any computer disruptions. ICF Macro will not share these passwords with the IRS at any time during or after this study.

If you have any questions about the survey administration or are having problems accessing the survey, please contact Sherri Settle at ICF Macro at [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com) or 1-888-285-7976.

If you have any general questions about the nature of the study, please contact Ron Smith, Chief, Strategic Planning & Development, at (404) 338-8512 or [Ron.Smith@irs.gov](mailto:Ron.Smith@irs.gov).

Thank you in advance for your participation.

John Hurley  
Project Director  
ICF Macro

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.

SPEC Partner National Partner Survey Final  
Reminder

From: [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com)

To: [e-mail address]

Subject: Final Reminder: 2010 IRS SPEC Partner Satisfaction Survey

Dear IRS SPEC Partner:

You may just have overlooked our earlier e-mail message asking for your participation in the 2010 IRS SPEC Partner Satisfaction Survey. Or, you may have begun the survey but did not complete it. In either case, we would like to give you a final chance to complete the web-based survey so we can include your feedback for the IRS. If you have completed the survey, thank you for your participation.

The cut-off date for you to complete the survey is Friday, March 26, 2010. If you have already started the survey, the survey will resume exactly where you left off with all of your previous responses saved.

Your survey is located on the Internet at [\[Hyperlink\]](#)

The survey should take only 15 minutes or less.

If you have any questions about the survey administration or are having problems accessing the survey, please contact Sherri Settle at ICF Macro at [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com) or 1-888-285-7976.

If you have any general questions about the nature of the study, please contact Ron Smith, Chief, Strategic Planning & Development, at (404) 338-8512 or [Ron.Smith@irs.gov](mailto:Ron.Smith@irs.gov).

Thank you and I look forward to receiving your feedback.

John Hurley  
Project Director  
ICF Macro

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.



# SPEC Partner Local Partner Survey



- 01 Yes [CONTINUE]  
 02 No [SKIP TO INTRODUCTION]

///ASK IF S3=01///

S4. While your name was on the contact list for [INSERT ORGANIZATION (PartnerName field)], we are not interviewing IRS SPEC employees, but representatives from its partner organizations. We apologize for the inconvenience. If you know of someone else at [INSERT ORGANIZATION (PartnerName field)] who would be more appropriate to give us this feedback, would you please record their name, telephone number and email address below so that we could contact him/her for feedback?

NAME FIELD (First and Last)

TELEPHONE FIELD (10-digit)

EMAIL ADDRESS FIELD (please make sure to enter an @ and a . to make a valid email.)

Thank you very much for your help.

///ASK IF S3=01///

CLOSE2. Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding the study. The OMB number for this study is 1545-1432. If you have any comments regarding this study, please write to: IRS, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Avenue, NW, Washington, DC 20224

[Terminate Survey– GO TO SECTION XV]]

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///ASK IF S3=02///

## **I. Introduction**

### **A.**

Thank you. Please, feel free to be open and frank with us. 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.

B. 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.

///ASK IF S3=02///

## **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. (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)

///ASK IF S3=02///

Q2. Which of the following types of customers do you serve most frequently? (Check all that apply)

- 01 Low Income—less than \$49,000
- 02 Elderly
- 03 Military
- 04 People with disabilities
- 07 Rural
- 08 American Indian or Alaska Native
- 09 Limited English Proficient
- 10 Something else (Specify)

///ASK IF S3=02///

Q3. For how many years has your organization provided return preparation, outreach, education, or other tax assistance as an SPEC partner?

\_\_\_ years

///ASK IF S3=02///

Q4. Approximately how many customers do you serve through your return preparation, outreach, or other tax-assistance programs per year?

- 01 Fewer than 100
- 02 101 to 1000
- 03 1001 to 2500
- 04 More than 2500

///ASK IF S3=02///

Q5. Approximately how many volunteers or staff, including employees, do you coordinate to provide return preparation, outreach, or other tax assistance per year?

- 01 1 to 10
- 02 11-50
- 03 51-100
- 04 101-500
- 05 More than 500

///ASK IF S3=02///

Q6. Are you an affiliate of a national organization that has a national-level partnership agreement with SPEC?

- 01 Yes
- 02 No

///ASK IF S3=02///

**III. Relationship Manager**

Now we 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. If an item is not applicable or if you have no experience with it, or you are unaware the product/service is available, please choose Not applicable/Have not used/No experience.

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 [ROTATE A-D]

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

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

///ASK IF S3=02///

Q8. 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...? [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.
- E. Reviewing your educational products for technical accuracy
- F. Identifying and establishing partnerships with community-based organizations
- G. Providing you with results of your accomplishments and/or helping you assess the impact of your program
- H. Reviewing Quality Site Requirements
- I. SPEC-provided research, such as databases, MapPoint Analysis, reports, return filing statistics or tables

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]

///ASK IF S3=02///

Q9. Overall, 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]

///ASK IF S3=02///

Q9A. Thinking about your overall satisfaction with your relationship manager last year, would you say this year you are more satisfied, less satisfied, or that your overall satisfaction with your relationship manager has remained about the same? If this is your first year working with SPEC, please choose “Not Applicable”.

- 05 More satisfied
- 04 Remained about the same
- 03 Less satisfied
- 06 [Not applicable/Have not used/No experience]

///ASK IF Q9A=05///

Q9B. Why do you say you are more satisfied overall with your SPEC relationship manager this year compared to last year?

[Record verbatim]

///ASK IF Q9A=03///

Q9C. Why do you say you are less satisfied overall with your SPEC relationship manager this year compared to last year?

[Record verbatim]

[ASK IF Q6 = 01]

[If Q6 = 02, AND Q1=01,02,04,05,07 SKIP TO SECTION V]

[If Q6 = 02, AND Q1=03,06 SKIP TO SECTION VI]

#### **IV. Relationship Building**

We would now like to ask you to rate your satisfaction with the relationship between you, the local SPEC office 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 of the items mentioned.

Q10. On a scale of 1 to 5, where 5 means very satisfied and 1 means very dissatisfied, how satisfied are you with...? [ROTATE A-B]

D. SPEC’s success in building relationships between you and local SPEC relationship managers

E. 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]

[If Q1 = 01,02,04,05,07 CONTINUE]

[If Q1 = 03, 06 only SKIP TO SECTION VI]

#### **V. Tax Law Training Service and Training Materials**

Now we 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.

Q11. How do the majority of the volunteers at your partnership or coalition receive tax law training?

- 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 VI

///ASK IF Q11=01,02,03,04, ELSE SKIP TO SECTION VI ///

Q12. Thinking about the 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... [ROTATE A-E]

- A. -“Link and Learn Taxes”
- B. Publication 4012 - Volunteer Resource Guide—also known as the VITA/TCE Spiral Bound Reference Guide
- C. Publication 4491 – Process Based Training
- D. Form 6744 – The Volunteer Assistor’s Test/Retest
- E. Publication 4555 – The tax law training Facilitator’s Guide

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]

///ASK IF Q11=01,02,03,04, ELSE SKIP TO SECTION VI ///

Q13. 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]

[ASK IF Q1 = 01,02,04,05,07 ]

[IF Q1 = 03,06 SKIP TO SECTION VII]

**VI. E-file and Related Materials**

We’d now like to ask you to rate your satisfaction with the products and materials used to e-file tax returns. 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.

Q14. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with these e-file products and materials? If you have not used these or are not aware of them, please let me know. [ROTATE C AND 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. Publication 3189 - E-file Administrator Guide

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]

///ASK ALL///

### VII. Community Network Pages

Next, we would like to ask about the online resources available for partners at [www.irs.gov](http://www.irs.gov).

Q15. How satisfied are you with the current information on the Community Network web pages on [IRS.gov](http://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. Volunteer Training Materials
- B. Partner and Volunteer resource Center
- C. Link & Learn Taxes
- D. VITA Grant Program
- E. 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]

Q16a. What other information would you like to see included on the Community Network Pages?

[Record verbatim]

[ASK IF Q1 = 03,06,07]

[IF Q1 = 01,02,04,05 SKIP TO SECTION X]

### VIII. Marketing Products and Materials

Q17 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 frequently and 1 being not at all, how often do you utilize SPEC developed marketing products and materials?

- 05 Very frequently



- 04
- 03
- 02
- 01 Not at all
- 07 [Unaware product/service was available]

[ASK IF Q1 = 03,06,07]

Q18 How likely are you to use other marketing products and materials that you or your organization has developed rather than SPEC developed marketing products and materials?

- 05 Very likely
- 04
- 03
- 02
- 01 Not at all likely
- 07 [Unaware product/service was available]

[ASK IF Q18 = 04,05]

Q18A. If you are likely to use other marketing products or materials that you or your organization has developed, what would those products be?

[Record verbatim]

[ASK IF Q17 = 02,03,04,05]

[IF Q17 = 01,07 SKIP TO Q20]

Q19 Now let's talk about specific marketing products and materials. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with the following SPEC 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. [DO NOT ROTATE]

- A. Pub 4705 - Tax Relief for Struggling Homeowners Brochures
- B. Pub 4156 – Life Cycle Series: Birth - Childhood
- C. Pub 4156 Sp- Life Cycle Series: Birth - Childhood
- D. Pub 3965 – Got Kids? You May be Able to Take Child Tax Credit
- E. Pub 3961 Eng/Sp – Child Tax Credit (Stuffer)
- F. Pub 3966 – Living with Disabilities
- G. Pub 4787 - Catch a Break - ARRA Overview

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]

[ASK IF Q1 = 03,06,07]

Q20. Does SPEC need to develop other types of marketing materials to assist with your outreach efforts?

- 01 Yes
- 02 No

[ASK IF Q20 = 01, ELSE SKIP TO Q31]

Q20a. What other types of marketing materials would be helpful for you?

[Record verbatim]

///ASK IF Q1=03,06,07 AND Q17=01,02,03,04,05///

Q21. 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]

[IF Q1 = 01,02,04,05,07 CONTINUE]  
 [IF Q1 = 03,06 ONLY SKIP TO SECTION XI]

**IX. Privacy, Anonymity and Security**

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

[IF Q1 = 01,02,04,05,07 CONTINUE]

Q22. Did SPEC provide guidance material to assist with the privacy, Anonymly and security of taxpayer data?

- 01 Yes
- 02 No
- C.

[IF Q1 = 01,02,04,05,07 CONTINUE]

Q23. Overall, how satisfied are you with SPEC’s efforts to improve the privacy, Anonymity, 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]

[IF Q1 = 01,02,04,05,07 CONTINUE]

**X. Quality Improvement Process**

Now we would like to ask you about SPEC’s VITA/TCE – Volunteer Return Preparation Program - Quality Site Requirements.

Q24. 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 Quality Site Requirements?

[IF Q1 = 01,02,04,07 ROTATE A-D]

[IF Q1 = 05 ROTATE A,B,& D ONLY]

- D.
- H. Form 13614C - Intake & Interview Sheet
- I. Publication 4012 - Volunteer Resource Guide
- J. Publication 1084 - Volunteer Site Coordinator's Handbook
- K. VITA Hotline (1-800-829-VITA)

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]

///ASK IF Q24D = 04 or 05///

Q24.1. What did you like about the VITA Hotline?

///ASK IF Q24D = 01 or 02///

Q24.2. Why were you dissatisfied with the VITA Hotline?

[IF Q1 = 01,02,04,05,07 CONTINUE]

Q25. Using the same scale overall how satisfied are you with the guidance, tools, and support provided by SPEC to improve the 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]

///ASK IF S3=02///

**XI. Overall Satisfaction**

Q26. We've asked about the service you may 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]

///ASK IF S3=02///

Q26A. Thinking about your overall satisfaction with SPEC last year, would you say this year you are more satisfied, less satisfied, or that your overall satisfaction has remained about the same? If this is your first year working with SPEC, please choose "Not Applicable".

- 05 More satisfied
- 04 Remained about the same
- 03 Less satisfied
- 06 [Not applicable/Have not used/No experience]

///ASK IF Q26A=05///

Q26B. Why do you say you are more satisfied overall with SPEC this year compared to last year?

[Record verbatim]

///ASK IF Q26A=03///

Q26C. Why do you say you are less satisfied overall with SPEC this year compared to last year?

[Record verbatim]

///ASK IF S3=02///

Q27. 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

[ASK IF Q27 = 01,02 ELSE SKIP TO SECTION XII]

Q28. If you do not anticipate partnering with SPEC next year, what is the main reason you are relatively unlikely to continue?

[Record verbatim]

[If Q1 = 03,06,07 Continue]

[If Q1 = 01,02,04,05 Skip to Section XIV]

## **XII. EITC Marketing Materials**

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.

Q29. Are you familiar with EITC's marketing campaign slogan "Life's Easier with EITC"?

- 01 Yes
- 02 No

Q30. Are you aware of how to order and obtain free EITC publications and marketing materials from IRS?

- 01 Yes
- 02 No

///ASK IF Q1 = 03,06,07///

Q31. Have you used any of the following EITC marketing materials to assist you in your efforts to provide education and outreach, tax preparation and/or asset building efforts? [ROTATE A-I]

- 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

Follow up on 31H or Q31I – If either is yes then

Q32a Are you aware you can use the free Marketing Express web service on [www.EITC.irs.gov](http://www.EITC.irs.gov) to develop your own EITC marketing materials that you can print?

01 Yes

02 No

Follow up on Q32a -If yes then

Q32b Have you used the free Marketing Express web service on [www.EITC.irs.gov](http://www.EITC.irs.gov) to develop your own EITC marketing materials that you can print??

01 Yes

02 No

///ASK IF Q1 = 03,06,07///

Q33. How frequently do you visit the following EITC related online resources?

- A. EITC pages on [www.irs.gov](http://www.irs.gov)
- B. EITC Assistant on [irs.gov](http://irs.gov) in either English or Spanish
- C. Online tools and resources found on EITC Central or [eitc.irs.gov](http://eitc.irs.gov)

05 Once Daily

04 Once Weekly

03 Once Monthly

02 Occasionally

01 Never

07 [Unaware product/service was available]

[Programmer: Q33A, 33B, and 33C are to be treated as independent questions. All three questions are to be asked. Skip patterns for each of these three questions determine ONLY whether the corresponding item within Q59 will be asked or not.]

[If Q33A = 02,03,04,05 Ask Q34A]

[If Q33A = 01,07 Do not ask Q34A]

[If Q33B = 02,03,04,05                      Ask Q34B]  
[If Q33B = 01,07                              Do not ask Q34B]

[If Q33C = 02,03,04,05                      Ask Q34C]  
[If Q33C = 01,07                              Do not ask Q34C]

Q34. 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](http://www.irs.gov)
- C. EITC Assistant on irs.gov in either English or Spanish
- D. Online tools and resources found on EITC Central including customizable communication products

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]

///ASK IF S3=02///

**XIV. Close**

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

SPEC Partner Local Partner  
Pre-Notification Letter

From: [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com)

To: [Local Partner E-Mail address]

Subject: 2010 IRS SPEC Partner Satisfaction Survey

Dear [Name]:

You are receiving this e-mail because your organization is an IRS Stakeholder Partnerships, Education, and Communication (SPEC) local partner. During the next couple of weeks, you will receive another email from ICF Macro, a survey research and consulting firm. That email will invite you to complete a brief survey to provide your candid feedback about the products and services you receive from SPEC.

This year's survey questions have been revised to include items related to SPEC initiatives and our changing business environment. Based on feedback from partners surveyed in the past, the time for this year's survey has been significantly reduced.

Capturing your feedback is very important to the IRS. Your participation in this survey is critical so that we can improve our products and services to all of our local partners. ICF Macro will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. Your feedback will be provided to the IRS in aggregate only.

If you have any questions, please contact Ron Smith, Chief, Strategic Planning & Development, at (404) 338-8512 or your IRS relationship manager.

Thank you in advance for your participation.

Julieta D. Garcia  
Director, Stakeholder Partnerships, Education and Communication

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.



# SPEC Partner Local Partner Initial Notification

From: [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com)

To: [e-mail address]

Subject: 2010 IRS SPEC Partner Satisfaction Survey

Dear IRS SPEC Partner:

The IRS office of Stakeholder Partnerships, Education, and Communication (SPEC) is asking you, as one of their valued local partners, to help them determine where to focus their attention in 2010/2011. To do this, we invite you to participate in the 2010 SPEC Partner Satisfaction Survey. This web-based survey can be easily completed over the internet at your convenience. Your participation will help SPEC direct their efforts and resources to the programs needing them the most.

ICF Macro, an independent consulting firm, is administering this survey via the Internet. ICF Macro will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. Your feedback will be provided to the IRS in aggregate only.

The survey is located on the Internet at [\[Hyperlink\]](#)

The survey should take less than 15 minutes.

You can access the survey from any computer that has Internet access by clicking on the above Internet address or by copying the Internet address into your browser. The web address above includes a password that will enable you to exit the survey and re-enter at a later time. It will also protect any data you have entered if you experience any computer disruptions. ICF Macro will not share these passwords with the IRS at any time during or after this study.

Please complete this survey no later than Friday, March 26, 2010. If you have any questions about the survey administration or are having problems accessing the survey, please contact Sherri Settle at ICF Macro at [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com) or 1-888-285-7976.

If you have any general questions about the nature of the study, please contact Ron Smith, Chief, Strategic Planning & Development, at (404) 338-8512 or [Ron.Smith@irs.gov](mailto:Ron.Smith@irs.gov).

Thank you in advance for your participation.

John Hurley  
Project Director  
ICF Macro

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.

## SPEC Partner Local Partner First Reminder

From: [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com)

To: [e-mail address]

Subject: Reminder: 2010 IRS SPEC Partner Satisfaction Survey

Dear IRS SPEC Partner:

Recently you should have received an e-mail message from ICF Macro asking for your participation in the 2010 SPEC Partner Satisfaction Survey. To ensure that the findings represent the views of all SPEC partners, we urge you to take a few minutes to complete the survey. The final cut-off date is Friday, March 26, 2010. If you have already completed the survey, thank you for your participation.

The survey is located on the Internet at [\[Hyperlink\]](#)

The survey should take less than 15 minutes.

You can access the survey from any computer that has Internet access by clicking on the above Internet address or by copying the Internet address into your browser. The web address above includes a password that will enable you to exit the survey and re-enter at a later time. It will also protect any data you have entered if you experience any computer disruptions. ICF Macro will not share these passwords with the IRS at any time during or after this study.

If you have any questions about the survey administration or are having problems accessing the survey, please contact Sherri Settle at ICF Macro at [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com) or 1-888-285-7976.

If you have any general questions about the nature of the study, please contact Ron Smith, Chief, Strategic Planning & Development, at (404) 338-8512 or [Ron.Smith@irs.gov](mailto:Ron.Smith@irs.gov).

Thank you in advance for your participation.

John Hurley  
Project Director  
ICF Macro

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.

# SPEC Partner Local Partner Final Reminder

From: [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com)

To: [e-mail address]

Subject: Final Reminder: 2010 IRS SPEC Partner Satisfaction Survey

Dear IRS SPEC Partner:

You may just have overlooked our earlier e-mail message asking for your participation in the 2010 IRS SPEC Partner Satisfaction Survey. Or, you may have begun the survey but did not complete it. In either case, we would like to give you a final chance to complete the web-based survey so we can include your feedback for the IRS. If you have completed the survey, thank you for your participation.

The cut-off date for you to complete the survey is Friday, March 26, 2010. If you have already started the survey, the survey will resume exactly where you left off with all of your previous responses saved.

Your survey is located on the Internet at [\[Hyperlink\]](#)

The survey should take only 15 minutes or less.

If you have any questions about the survey administration or are having problems accessing the survey, please contact Sherri Settle at ICF Macro at [IRS.SPEC.Partners@mmail.macrointernational.com](mailto:IRS.SPEC.Partners@mmail.macrointernational.com) or 1-888-285-7976.

If you have any general questions about the nature of the study, please contact Ron Smith, Chief, Strategic Planning & Development, at (404) 338-8512 or [Ron.Smith@irs.gov](mailto:Ron.Smith@irs.gov).

Thank you and I look forward to receiving your feedback.

John Hurley  
Project Director  
ICF Macro

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.