**Script for recruitment. This script is sent via email, if email addresses are available. Otherwise, this information is presented at the conclusion of the event.**

**TE/GE Education & Outreach Survey**

The IRS is committed to delivering quality customer service. You can help in this important mission by completing this survey about the IRS outreach event you recently attended. This voluntary survey takes less than three minutes to complete and your responses will be anonymous.

You will be asked for an event number. Your event number is [insert number]

To complete this survey click [here](http://www.cvent.com).

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.

**TE/GE Education & Outreach Survey**

Employee Plans (EP) events will enter an number between 1 and 33332.

Exempt Organizations (EO) events will enter a number between 33333 and 66665

Government Entities (GE) events will enter a number betweeen 66666 and 99999.

|  |
| --- |
| \*1. Please enter the event number provided(\*Required) |
| *Enter a number (Minimum 1, Maximum 99999).* |
| |  | | --- | |  | |

|  |
| --- |
| 2. Please indicate your overall satisfaction with the presentation |
| *Select one.* |
| |  |  | | --- | --- | |  | Very satisfied | |  | Somewhat satisfied | |  | Neither satified nor dissatisfied | |  | Somewhat dissatisfied | |  | Very dissatisfied | |

Q3 answered by EO and GE only

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| --- |
| 3. Please rate the extent to which you agree or disagree with the following statements |
| *Select one per row.* |
| |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | |  | *Strongly Agree* | *Agree* | *Neither Agree nor Disagree* | *Disagree* | *Strongly Disagree* | *Not Applicable* | | The content presented was helpful |  |  |  |  |  |  | | The stated learning objectives were met |  |  |  |  |  |  | | The program material contributed to the achievement of the learning objectives |  |  |  |  |  |  | | The program material was accurate |  |  |  |  |  |  | | The content will help me to perform my work |  |  |  |  |  |  | | The presenter(s) was effective in delivering the content |  |  |  |  |  |  | | The technology used was satisfactory |  |  |  |  |  |  | |

Q4 answered by EP only

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| --- |
| 4. Please rate the extent to which you agree or disagree with the following statements |
| *Select one per row.* |
| |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | |  | *Strongly Agree* | *Agree* | *Neither Agree nor Disagree* | *Disagree* | *Strongly Disagree* | *Not Applicable* | | The content presented was helpful |  |  |  |  |  |  | | The stated learning objectives were met |  |  |  |  |  |  | | The program material was accurate |  |  |  |  |  |  | | The program material contributed to the achievement of the learning objectives |  |  |  |  |  |  | | The content will help me save for retirement |  |  |  |  |  |  | | The presenter(s) was effective in delivering the content |  |  |  |  |  |  | | The technology used was satisfactory |  |  |  |  |  |  | |

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| 5. Please rate the extent to which you agree or disagree with the following statement |
| *Select one per row.* |
| |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | |  | *Strongly Agree* | *Agree* | *Neither Agree nor Disagree* | *Disagree* | *Strongly Disagree* | *Not Applicable* | | The delivery mechanism (e.g. Webinar, Phone Forum) was appropriate for the content presented |  |  |  |  |  |  | |

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| --- |
| 6. Was the duration of the presentation: |
| *Select one.* |
| |  |  |  | | --- | --- | --- | |  | Too short | (Answer question number 6.1.) | |  | Just right | | |  | Too long | (Answer question number 6.2.) | |

|  |
| --- |
| 6.1 Please explain the reason(s) you felt the presentation was too short. |
| |  | | --- | |  | |  | |  | |  | |  | |

|  |
| --- |
| 6.2 Please explain the reason(s) you felt the presentation was too long. |
| |  | | --- | |  | |  | |  | |  | |  | |

Q7 answered by EO only

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| --- |
| 7. How did you hear about this event (check all that apply)? |
| *Select all that apply.* |
| |  |  | | --- | --- | |  | IRS email | |  | IRS newsletter | |  | IRS website (www.irs.gov) | |  | Other government agency | |  | Sponsoring university or organization | |  | Professional/trade organization | |  | Colleague or friend | |  | State association of nonprofits | |  | Employer/volunteer organization | |  | Social media (Twitter, Facebook, Pinterest, etc.) | |  | Other media (newspaper, TV, radio, etc.) | |  | Other | |

Q8 answered by EP and GE only

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| --- |
| 8. How did you hear about this event (check all that apply)? |
| *Select all that apply.* |
| |  |  |  | | --- | --- | --- | |  | IRS email | | |  | IRS newsletter | | |  | IRS website | | |  | IRS other | | |  | Non-IRS website | | |  | Professional/Trade organization | | |  | Friend or associate | | |  | Employer | | |  | Media (newspaper, TV, radio, etc.) | | |  | Other | (Answer question number 8.4.) | |

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| --- |
| 8.1 You selected "IRS Other", Please specify: |
| |  | | --- | |  | |

|  |
| --- |
| 8.2 You selected "Non-IRS Website". Please Specify: |
| |  | | --- | |  | |

|  |
| --- |
| 8.3 You selected "Professional/Trade Organization." Please specify: |
| |  | | --- | |  | |

|  |
| --- |
| 8.4 You selected "Other." Please specify: |
| |  | | --- | |  | |

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| --- |
| 9. Based on your experience at this event, how likely are you to attend future events with IRS speakers? |
| *Select one.* |
| |  |  | | --- | --- | |  | Very likely | |  | Somewhat likely | |  | Somewhat unlikely | |  | Very unlikely | |

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| --- |
| 10. What did you like about this presentation? |
| |  | | --- | |  | |  | |  | |  | |  | |

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| --- |
| 11. What would you like to change about this presentation? |
| |  | | --- | |  | |  | |  | |  | |  | |

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| 12. What additional topics would you like to see addresed at future IRS outreach presentations? |
| |  | | --- | |  | |  | |  | |  | |  | |

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| 13. Do you have any other suggestions or comments to help us improve future presentations and events? |
| |  | | --- | |  | |  | |  | |  | |  | |

Q14 answered by EP only

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| --- |
| 14. Which of the following describes you (check all that apply)? |
| *Select all that apply.* |
| |  |  |  | | --- | --- | --- | |  | Practitioner (attorney, CPA, actuary, enrolled retirement plan agent, third party administrator) | | |  | Retirement plan sponsor (employer) | | |  | Retirement plan participant (employee) | | |  | Individual taxpayer (IRA owner and beneficiary) | | |  | Enrolled agent | | |  | Other | (Answer question number 14.1.) | |

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| 14.1 You indicated other, please specify: |
| |  | | --- | |  | |

Q15 answered by EO only

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| --- |
| 15. Which of the following best describes you (check all that apply)? |
| *Select all that apply.* |
| |  |  |  | | --- | --- | --- | |  | Nonprofit employee | | |  | Nonprofit volunteer | | |  | Nonprofit board member or officer | | |  | Tax professional | | |  | Other | (Answer question number 15.1.) | |

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| 15.1 You indicated other, please specify: |
| |  | | --- | |  | |

Q16 answered by GE only

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| --- |
| 16. Which of the following describes you (check all that apply)? |
| *Select all that apply.* |
| |  |  |  | | --- | --- | --- | |  | Issuer | | |  | Conduit borrower | | |  | Legal counsel | | |  | Investor | | |  | Federal agency | | |  | Underwriter/Financial or market analyst | | |  | External tax professional | | |  | Government/Tribal entity manager | | |  | Government/Tribal entity employee | | |  | Internal attorney or accountant | | |  | Other | (Answer question number 16.1.) | |

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| 16.1 You indicated other, please specify: |
| |  | | --- | |  | |

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