

## SURVEY INSTRUMENT

### Internal Revenue Service (IRS) Survey of Volunteerism

The IRS is committed to better understanding the types of individuals that choose to commit their time to volunteer tax preparation. You can help in this important mission by providing your feedback below. This voluntary survey should take less than 10 minutes to complete. Our survey partner, [Contractor], will not provide your identity to the IRS and will keep your identity private to the extent permitted by law. If you have any questions about this survey, please contact [Contractor] at [Contractor contact phone or email].

<b>1</b>	<b>Purpose of Volunteering</b>
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- 1A. Are you presently, or have been within the past 12 months, engaged in volunteer work?  
 Yes  
 No

Please rate the accuracy of the following statements:		Not At All Accurate			Completely Accurate	
		1	2	3	4	5
1B.	Volunteering can help me to get my foot in the door at a potential new job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1C.	My friends volunteer.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1D.	I am concerned about those less fortunate than myself.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1E.	People I'm close to want me to volunteer.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1F.	Volunteering makes me feel important.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1G.	People I know share an interest in community service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1H.	No matter how bad I've been feeling, volunteering helps me to forget about it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1I.	I am genuinely concerned about the particular group I am serving.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1J.	By volunteering I feel less lonely.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1K.	I can make new contacts that might help my business or career.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1L.	Doing volunteer work relieves me of some of the guilt over being more fortunate than others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1M.	I can learn more about the cause for which I am working.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1N.	Volunteering increases my self-esteem.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1O.	Volunteering allows me to gain a new perspective on things.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1P.	Volunteering allows me to explore different career options.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1Q.	I feel compassion toward people in need.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1R.	Others with whom I am close place a high value on community service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1S.	Volunteering lets me learn things through direct, hands on experience.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1T.	I feel it is important to help others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1U.	Volunteering helps me work through my own personal problems.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1V.	Volunteering will help me to succeed in my chosen profession.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1W.	I can do something for a cause that is important to me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1X.	Volunteering is an important activity to the people I know best.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1Y.	Volunteering is a good escape from my own troubles.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1Z.	I can learn how to deal with a variety of people.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1AA.	Volunteering makes me feel needed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1AB.	Volunteering makes me feel better about myself.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1AC.	Volunteering experience will look good on my resume.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1AD.	Volunteering is a way to make new friends.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1AE.	I can explore my own strengths.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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### Attitudes Toward Volunteering

The following questions concern your attitudes towards your volunteer work and the place where you volunteer (your volunteer site). Please indicate how true each of the following statement is for you given your experiences with volunteering.

Attitudes Towards Volunteering	Not At All True					Very True
	1	2	3	4	5	
2A. I feel like I can make a lot of inputs to deciding how my volunteer work gets done.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2B. I really like the people I volunteer with.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2C. I do not feel very competent when I am volunteering.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2D. People at my volunteer site tell me I am good at what I do.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2E. I feel pressured at my volunteer site.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2F. I get along with people at my volunteer site.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2G. I pretty much keep to myself when I am at my volunteer site.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2H. I am free to express my ideas and opinions while volunteering.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2I. I consider the people I volunteer with to be my friends.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2J. I have been able to learn interesting new skills while volunteering.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2K. When I am volunteering, I have to do what I am told.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2L. Most days I feel a sense of accomplishment from volunteering.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2M. My feelings are taken into consideration at my volunteer site.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2N. While volunteering, I do not get much of a chance to show how capable I am.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2O. People at my volunteer site care about me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2P. There are not many people at my volunteer site that I am close to.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2Q. I feel like I can pretty much be myself at my volunteer site.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2R. The people I volunteer with do not seem to like me much.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2S. When I am volunteering I often do not feel very capable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2T. There is not much opportunity for me to decide for myself how to go about my volunteer work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2U. People at my volunteer site are pretty friendly towards me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

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### Satisfaction With Volunteer Experience

The following list of words describes different benefits of volunteering. Read each statement and indicate to what extent you have felt this way about your volunteer work:

Benefits of Volunteering	Strongly Disagree			Strongly Agree	
	1	2	3	4	5
3A. People close to me learned that I did volunteer work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3B. I felt important.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3C. I expressed my ideas and opinions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3D. I was able to explore my own personal strengths.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3E. My friends found out that I did volunteer work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3F. It developed strengths and capabilities I didn't know I had.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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3G.	I felt less lonely.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3H.	I was able to add important experience to my resume.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3I.	It gave me new ways to interact with others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3J.	I made new contacts that might help my business or career.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3K.	It says a lot about who I am as a person.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3L.	I am genuinely concerned about the people who were helped.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3M.	I did something for a cause I believe in	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3N.	It gave me a sense of competence.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3O.	I felt better about myself.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3P.	I was able to work through some of my own personal problems.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3Q.	I learned how to deal with a greater variety of people.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3R.	I now know and care about what happens in my community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Now, please indicate how true each of the following statement is for you given your **overall experiences** using the following scale:

<b>Satisfaction with Volunteering</b>		<b>Strongly Disagree</b>			<b>Strongly Agree</b>	
		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
3S.	I enjoy my volunteer experiences.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3T.	I find my volunteer experiences to be personally fulfilling.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3U.	I believe that my volunteering is worthwhile.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3V.	I make an important contribution to the organization I volunteer for.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3W.	I feel I accomplished some 'good' through my work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3X.	I am likely to volunteer for this organization in the future.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3Y.	I look forward to doing my volunteer work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3Z.	I am satisfied with my experience as a volunteer.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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### Personal Attitudes and Characteristics

This section contains a number of statements concerning personal attitudes and characteristics. Please answer the following questions truthfully, following the prompts as indicated.

Please rate the extent to which you <b>typically agree with the following statements</b> :		<b>Strongly Disagree</b>			<b>Strongly Agree</b>	
		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
4A.	I feel that I am a person of worth, at least on an equal plane with others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4B.	I feel like a person who has a number of good qualities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4C.	All in all, I am inclined to feel like a failure.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4D.	I feel as if I am able to do things as well as most other people.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4E.	I feel as if I do not have much to be proud of.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4F.	I take a positive attitude toward myself.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4G.	On the whole, I am satisfied with myself.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4H.	I wish that I could have more respect for myself.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4I.	I certainly feel useless at times.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4J.	At times I think that I am no good at all.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Please rate how well each statement describes <b>how you feel about your life:</b>		Strongly Disagree			Strongly Agree	
		1	2	3	4	5
4K.	In most ways, my life is close to my ideal.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4L.	The conditions of my life are excellent.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4M.	I am satisfied with my life.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4N.	If I could live my life over, I would change almost nothing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4O.	So far, I have gotten the important things I want in life.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4P.	At present, I am completely satisfied with my life	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4Q.	In the near future, a lot of things will have to change before I feel satisfied with my life.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please indicate <b>how true the following statements are for you:</b>		Not At All True			Very True	
		1	2	3	4	5
4R.	While I volunteering I think about how much I enjoy it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4S.	I find the volunteer work very interesting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4T.	Volunteering is fun.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4U.	I enjoy volunteering very much.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4V.	I think volunteering was very boring.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4W.	I think volunteering was very interesting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4X.	I would describe volunteering as very enjoyable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please read the pairs of statements, one pair at a time, and think about which statement within the pair seems more true to you at this point in your life. Indicate the degree to which statement A feels true, relative to the degree that statement B feels true.

If statement A feels completely true and statement B feels completely untrue, the appropriate response would be 1. If the two statements are equally true, the appropriate response would be a 3. If only statement B feels true then the appropriate response would be 5, and so on.

Personal Attitudes		Only A Feels True			Only B Feels True	
		1	2	3	4	5
4Y.	A. I always feel like I choose the things I do. B. I sometimes feel that it's not really me choosing the things I do.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4Z.	A. My emotions sometimes seem alien to me. B. My emotions always seem to belong to me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4AA.	A. I choose to do what I have to do. B. I do what I have to, but I don't feel like it is really my choice.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4AB.	A. I feel that I am rarely myself. B. I feel like I am always completely myself.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4AC.	A. I do what I do because it interests me. B. I do what I do because I have to.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4AD.	A. When I accomplish something, I often feel it wasn't really me who did it. B. When I accomplish something, I always feel it's me who did it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4AE.	A. I am free to do whatever I decide to do. B. What I do is often not what I'd choose to do.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4AF.	A. My body sometimes feels like a stranger to me B. My body always feels like me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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- |      |   |   |   |   |   |   |
|------|---|---|---|---|---|---|
| 4AG. | A. I feel pretty free to do whatever I choose to.       | ○ | ○ | ○ | ○ | ○ |
|      | B. I often do things that I don't choose to do.         |   |   |   |   |   |
| 4AH. | A. Sometimes I look into the mirror and see a stranger. | ○ | ○ | ○ | ○ | ○ |
|      | B. When I look into the mirror I see myself.            |   |   |   |   |   |

5

### Other Information

- 5A. How long have you been a volunteer?
- Less than 1 year
  - 1-2 years
  - 3-5 years
  - 6-10 years
  - More than 10 years
- 5B. How many hours during an average week are you engaged in volunteer work?
- Less than 1 hour
  - 1-3 hours
  - 4-8 hours
  - 8-10 hours
  - 10 or more hours
  - I do not engage in volunteer work every week.
- 5C. How many organizations have you volunteered with during the past 12 months?
- 1
  - 2
  - 3
  - 4
  - 5 or more
- 5D. How would you describe the type(s) of volunteering you do? Please check all that apply.
- Volunteer tax preparer (e.g., Volunteer Income Tax Assistance (VITA) volunteer)
  - Coach, referee, or supervise sports teams
  - Tutor or teach
  - Mentor youth
  - Be an usher, greeter, or minister
  - Collect, prepare, distribute, or serve food
  - Fundraise or sell items to make money
  - Provide counseling, medical care, FIRE/EMS, or protective services
  - Provide general office services
  - Provide professional or management assistance, including serving on a board or committee
  - Engage in music performance, or other artistic activities
  - Engage in general labor, supply general transportation to people
  - Some other activity
- 5E. Which of these best describes your **primary** volunteer activity?
- Volunteer tax preparer (e.g., Volunteer Income Tax Assistance (VITA) volunteer)
  - Coach, referee, or supervise sports teams
  - Tutor or teach
  - Mentor youth
  - Be an usher, greeter, or minister
  - Collect, prepare, distribute, or serve food
  - Fundraise or sell items to make money
  - Provide counseling, medical care, FIRE/EMS, or protective services
  - Provide general office services
  - Provide professional or management assistance, including serving on a board or committee
  - Engage in music performance, or other artistic activities
  - Engage in general labor, supply general transportation to people
  - Some other activity

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5F. How do you typically volunteer? Please check all that apply.

- Alone
- With family
- With one or two friends
- With a large group (e.g., social organization or church group)

5G. Where do you typically look for information about volunteer opportunities? Please check all that apply.

- Facebook
- Twitter
- Google+
- Church or organizational publication (e.g., newsletters)
- National publications (e.g. newspapers, magazines)
- Local publications (e.g. newspapers, magazines)
- News websites
- Blogs

5H. On which social media sites do you typically share information about or publicize your volunteerism? Please check all that apply.

- Facebook
- Twitter
- Tumblr
- LinkedIn
- Google+
- YouTube
- Other (please specify): \_\_\_\_\_
- I do not share information about my volunteerism on social media.

5I. Where do you access the Internet? Please check all that apply.

- Home
- Work
- Public library or other public place that provides internet access (e.g., school, Internet café)
- Not applicable/Do not have internet access (**please skip to question 5K**)

5J. What devices do you typically use to access the Internet? Please check all that apply.

- Desktop computer
- Laptop computer
- Tablet (e.g., iPad)
- Smartphone (e.g., iPhone, Droid, Blackberry)
- Other (please specify): \_\_\_\_\_

5K. What is your employment status?

- Student, working part time
- Student, working full time
- Full time student (**please skip to Question 5M**)
- Employed full time
- Employed part time
- Not employed, but looking for work
- Not employed and not looking for work (**please skip to Question 5M**)
- Retired, working part time
- Retired, not employed (**please skip to Question 5M**)

5L. If you are currently employed or looking for work, what is your field of work (e.g., education, finance, health)?

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5M. What is your marital status?

- Single, never married
- Married
- Civil union/Domestic partnership
- Separated
- Divorced
- Widowed

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5N. Which category describes your current age?

- 18 to 24 years
- 25 to 34 years
- 35 to 44 years
- 45 to 54 years
- 55 to 64 years
- 65 to 74 years
- 75 to 84 years
- Over 85 years

5O. What is the highest level of education you have completed?

- Grade school
- Some high school
- High school diploma/GED
- Trade/Vocational school
- Some college
- Associate's degree
- Bachelor's degree
- Advanced degree (Master's, Doctoral, or professional degree)



If you have been unable to resolve any specific problems with your tax matter through the normal IRS channels, or now face a significant hardship due to the application of the tax law, we encourage you to contact the National Taxpayer Advocate Helpline at 1-877-777-4778.

**Thank you for completing the survey. Please return this questionnaire by mail using the enclosed international business return envelope or by mailing the survey to the following address:**

[Contractor Name]  
IRS Survey of Volunteerism  
[Contractor Street Address]  
[Contractor City, State, Zip]

**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 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, IR-6406, Washington, DC 20224.

**WAVE1: SURVEY PRE-NOTE**

IRS LETTERHEAD

DATE

ID#

FIRSTNAME LASTNAME

SAMPLE ADDRESS 1

SAMPLE ADDRESS 2 POSTAL CODE

Dear FIRSTNAME LASTNAME:

The Internal Revenue Service (IRS) needs your help in improving the services it provides to volunteers. I invite you to take part in the *Survey of Volunteerism*, which asks for your attitudes, opinions, and your experiences volunteering. Your candid feedback is critical to the accuracy of this study and will help the IRS determine what enhancements are needed to improve the experiences volunteer tax preparers.

[Contractor], an independent research company, is administering the survey for the IRS. In a few weeks, you will receive a letter from [Contractor] with instructions for completing the survey online or by mail. By completing this survey, you will help the IRS better serve its volunteer tax preparers.

**You do not need to wait for the paper survey. [Contractor] has made the online version available right now. I encourage you to complete the survey by typing the following link into your web browser and entering the unique password provided:**

[insert Contractor link here]

Password: [insert password]

[Contractor] will not provide any identifying information to the IRS and will keep your identity private to the extent permitted by law. Your participation in this study is voluntary. The survey should take about 10 minutes to complete.

I am personally committed to improving service to all volunteers, not just those that choose to do volunteer tax preparation. Please help me in this effort by completing the survey as soon as possible. If you do not receive a paper survey by [insert date], please contact the [Contractor Help Desk] by [Contractor phone or email]. If you wish to verify the IRS's sponsorship of the survey, please contact Patti Davis-Smith at 404-338-8714 or Patti.J.Davis-Smith@irs.gov.

Thank you in advance for your participation.

Sincerely,

Antoinette M. Cross

Director, Research and Analysis

IRS, Wage and Investment Division



**WAVE2: COVER LETTER AND SURVEY**

**[Contractor Letterhead]**  
IRS Survey of Volunteerism  
[Contractor Address]

DATE

ID#

FIRSTNAME LASTNAME

SAMPLE ADDRESS 1

SAMPLE ADDRESS 2 POSTAL CODE

Dear FIRSTNAME LASTNAME:

A few weeks ago, you received a letter from Antoinette M. Cross, Director, Research and Analysis, Wage and Investment Division of the Internal Revenue Service (IRS) asking for your assistance with an important initiative to improve the IRS's service to volunteers. As part of this improvement effort, the IRS is conducting the *Survey of Volunteerism*. Your candid feedback is critical to the accuracy and utility of this study. The survey will help the IRS determine what enhancements will improve current and future services the IRS provides to volunteer tax preparers.

You were chosen at random to participate in this survey, which is administered by [Contractor], an independent research company. If you have already completed this survey online, thank you for your feedback. If not, you may complete the survey either online or by mail using the enclosed paper survey. If you are completing the survey by mail, please use the postage-paid reply envelope to return your completed survey by [insert date].

If you choose to complete it online, you can access the survey from any computer that has web access by typing the following address into your browser and then entering your unique password:

[insert Contractor link here]

Password: [insert password]

You will be able to exit the survey and re-enter at a later time using this password. It will also protect any data you have entered if you experience any computer disruptions. [Contractor] 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 individual responses will not be shared with the IRS but will be grouped with the responses from all individuals who complete this survey.

The survey should take about 10 minutes to complete. While your participation is voluntary, we encourage you to complete the survey. If you have any questions about the survey process, please contact the [Contractor Help Desk] by [Contractor phone or email]. If you wish to verify the IRS's sponsorship of the survey, please contact Patti Davis-Smith at 404-338-8714 or Patti.J.Davis-Smith@irs.gov.

Thank you for your participation.

Sincerely,  
[Contractor]

**WAVE 3: REMINDER LETTER**

[Contractor Letterhead]

DATE

ID#

FIRSTNAME LASTNAME

SAMPLE ADDRESS 1

SAMPLE ADDRESS 2 POSTAL CODE

Dear FIRSTNAME LASTNAME:

A few weeks ago, I sent you the *Survey of Volunteerism* asking for your candid feedback regarding your experiences volunteering. If you have already completed and submitted the survey, please accept our sincere thanks.

If you have not had a chance to complete the survey, please take a few minutes to **complete it online** by typing the following link into your web browser and entering the password provided:

[insert Contractor link here]

Password: [insert password]

If you prefer to complete the survey by mail, in a few weeks I will send a replacement paper copy to individuals who have not completed the survey. Your candid feedback is critical to the accuracy and utility of this study. The results of the survey will help the IRS determine what enhancements will improve current and future services the IRS provides to its volunteer tax preparers.

If you have any questions about the survey process, please contact the [Contractor Help Desk] by [Contractor phone or email]. If you wish to verify the IRS's sponsorship of the survey, please contact Patti Davis-Smith at 404-338-8714 or Patti.J.Davis-Smith@irs.gov.

Thank you for your participation.

Sincerely,

[Contractor]

**WAVE 4: THIRD LETTER AND SURVEY TO NON-RESPONDENTS**

[Contractor Letterhead]

DATE

ID#

FIRSTNAME LASTNAME

SAMPLE ADDRESS 1

SAMPLE ADDRESS 2 POSTAL CODE

Dear FIRSTNAME LASTNAME:

Recently [Contractor] sent you the *Survey of Volunteerism* asking for your feedback about your experiences volunteering. If you have already completed and submitted the survey, please accept our sincere thanks. If you have not done so, please take a few minutes now to complete the survey either online or by mail.

We want to learn more about your experiences, whether you choose to do volunteer tax preparation or not. Your candid feedback is critical to the accuracy of this study and will help the IRS determine what enhancements are to better serve its volunteer tax preparers.

If you choose to complete it online, you can access the survey from any computer that has web access by typing the following address into your browser and then entering your unique password:

[insert Contractor link here]

Password: [insert password]

You will be able to exit the survey and re-enter at a later time using this password. It will also protect any data you have entered if you experience any computer disruptions. Please complete the online or paper copy of the survey by [insert date]. If you choose to respond by mail, please use the postage-paid reply envelope to return your completed paper survey.

[Contractor] 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 individual responses will not be shared with the IRS but will be grouped with the responses from all individuals who complete this survey. The survey is quite brief and should take about 10 minutes to complete.

The IRS is committed to improving its performance and service to the public. Your honest opinions will help bring about these improvements. If you have any questions, please contact the [Contractor Help Desk] by [Contractor telephone or email]. If you wish to verify the IRS's sponsorship of the survey, please contact Patti Davis-Smith at 404-338-8714 or Patti.J.Davis-Smith@irs.gov.

Thank you in advance for your cooperation.

Sincerely,

[Contractor]

## WEBSITE INVITATION

Thank you for logging on to this site to complete the *Survey of Volunteerism* which asks for your opinions and experiences volunteering. The IRS needs your help in improving the services it provides to its volunteer tax preparers and individuals that volunteer, though not necessarily with tax preparation. Your candid feedback is critical to the accuracy of this study and will help the IRS determine what enhancements are needed to improve the experiences of volunteer tax preparers. [Contractor], an independent research company, is conducting this research on behalf of the IRS, and we would like to include your opinions. If you have any questions about this survey, please contact the [Contractor Help Desk] at [Contractor phone or email].

Please be assured that this survey is for research purposes only. You will not be required to give any personal financial information, nor will you be contacted by the IRS as a result of participating in the research. All responses will be held private to the extent covered by law.

**The survey should take approximately 10 minutes to complete. If you need to pause the survey at anytime, you can come back later and begin again where you left off. Simply save the web link and unique password to access your survey again. The survey will automatically take you to the point where you left off.**

Please click "NEXT" to begin.

The OMB number for this study is 1545-1432.

If you have any comments regarding this study, please write to:

Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, IR-6406, Washington, DC 20224.

**NEXT**