

# SPEC Partner Survey

Thank you for participating in the IRS's Stakeholder Partnerships, Education, and Communication (SPEC) organization's 2012 Partner Satisfaction Survey. This survey covers your satisfaction as a local partner who works with SPEC on outreach, education, return preparation and other tax assistance programs provided by SPEC.

The Contractor, an independent research firm, is conducting this survey on behalf of SPEC. The Contractor will hold your identity private to the extent permitted by law and will not provide any identifying information to the IRS along with your individual responses. Results will be provided only in aggregate.

**Instructions**

Click on the NEXT button to save your responses and continue to the next page.

Click on the PREVIOUS button to view your responses on a previous page. You may change your answers to previously entered responses.

You may suspend the survey at any time by clicking STOP. You may re-enter the survey where you left off by clicking on the survey website. If you close your browser without clicking STOP, the survey will automatically halt and you will need to wait 10 minutes to re-access the survey.

S1. Are you the person at **[INSERT ORGANIZATION PartnerName field]** who manages or interacts with SPEC who could provide us with candid feedback about SPEC?

01 Yes

02 No

///ASK IF S1=02///

S2. SPEC greatly values feedback on its performance from **[INSERT ORGANIZATION (PartnerName field)]**. 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 and email address below so that we could contact him/her for feedback?

NAME FIELD (First and Last)

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

Thank you very much for your help.

[Terminate Survey – GO TO SECTION XIV]

///ASK IF S1=01///

S3. Are you an IRS SPEC employee?

01 Yes

02 No

///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 and email address below so that we could contact him/her for feedback?

NAME FIELD (First and Last)

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

Thank you very much for your help.

[Terminate Survey– GO TO SECTION XIV]

## I. Introduction

///ASK IF S3=02///

Thank you. Please, feel free to be open and frank with us. Again, your identity and individual responses will be held private by The Contractor to the extent permitted by law, and your feedback will be provided to SPEC in aggregate only. Please keep in mind that this discussion will only be about your experiences with SPEC and not with any interactions you may have had with other parts of the IRS. Your responses are important in helping SPEC understand what makes a partnership successful.

Throughout the rest of this survey, “you” refers to your organization—that is, either to you as a partner or to your coalition. The first set of questions pertains to the nature of your relationship with SPEC and the customers you serve.

## II. Market Segments and Demographics

///ASK IF S3=02///

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 [1-40]

///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

### III. Relationship Manager

///ASK IF S3=02///

We would now 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.

Q6. 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-E]

- A. Courtesy
- B. Professionalism
- C. Proactiveness or anticipation of your needs
- D. Flexibility in meeting your needs

E. 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///

Q7. 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-H ]

A. Your selection of tax return preparation site locations—for example, what cities are in need of VITA sites

B. Reaching your target customers

C. Reviewing or assisting with your training plans

D. Reviewing your educational products for technical accuracy

E. Identifying and establishing partnerships with community-based organizations

F. Providing you with results of your accomplishments and/or helping you assess the impact of your program

G. Reviewing Quality Site Requirements

H. 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///

Q8. 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///

Q9. 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 Q9=05///

Q10. Why do you say you are more satisfied overall with your SPEC relationship manager this year compared to last year?

[Record verbatim]

///ASK IF Q9=03///

Q11. Why do you say you are less satisfied overall with your SPEC relationship manager this year compared to last year?

[Record verbatim]

#### IV. Tax Law Training Service and Training Materials

///ASK IF Q1 = 01,02,04,05,07, ELSE SKIP TO SECTION VI///

Now we would like to ask you about your satisfaction with the tax law training your volunteers received. As before, 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.

Q12. How would describe the return preparation experience level of the majority of your volunteers?

- 1 New – majority has less than 3 years of return preparation experience
- 2 Returning – majority has 3 to 5 years of return preparation experience
- 3 Expert – majority has more than 5 years of return preparation experience

///ASK IF Q1 = 01,02,04,05,07, ELSE SKIP TO SECTION VI///

Q13. How do the majority of the volunteers at your partnership or coalition receive tax law training?

- 1 Self Study (with face to face support)
- 2 Self Study (independent completion by volunteer)
- 3 Training taught by volunteers
- 4 Training taught by other partners
- 5 Training taught by SPEC staff
- 6 No training provided
- 7 [Not applicable] [

///ASK IF Q13=03,04,05 ELSE SKIP TO SECTION V ///

Q14. How long was the typical volunteer training?

- 1 About 8 hours

- 2 Between 8 and 16 hours
- 3 Between 16 and 24 hours
- 4 More than 24 hours

///ASK IF Q13=01,02,03,04,05 ELSE SKIP TO SECTION V ///

Q15. What training materials did your volunteers use the majority of the time for tax law training?

- 5 Link and Learn Taxes
- 6 Publication 4491 – VITA/TCE Training Guide

///ASK IF Q13=01,02,03,04,05 ELSE SKIP TO SECTION V ///

Q16. 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. Testing /Retesting Certification using Link and Learn Taxes
- C. Publication 4012 - Volunteer Resource Guide – Tax Law Content (whites tabs in publication)
- D. Publication 4012 - Volunteer Resource Guide – TaxWise® (blue and yellow tabs in publication)
- E. Publication 4491 – VITA/TCE Training Guide
- F. Publication 4491W – VITA/TCE Problems & Exercises

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 Q16A = 01,02]

Q17. Why are you dissatisfied with “Link and Learn Taxes” provided by SPEC for tax law training?

[Record verbatim]

## V. E-file and Related Materials

///ASK IF Q1 = 01,02,04,05,07, ELSE SKIP TO SECTION VI ///

We would now like 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.

Q18. 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]

## VI. VITA Grant Program

///ASK IF Q1 = 01,02,04,05,07, ELSE SKIP TO SECTION VIII///

We would now like you to rate your satisfaction with the products and materials used in the VITA Grant Program. 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.

Q19. Did your organization apply for an IRS VITA grant?

01 Yes

02 No

09 Don't know

///ASK IF Q19 = 01, ELSE SKIP TO SECTION VIII///

Q20. Was your organization awarded an IRS VITA grant to for the 2012 filing season?

01 Yes

02 No

09 Don't know

///ASK IF Q19 = 01///

Q21. On a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with the following products and materials related to the IRS VITA Grants program? If you have not used these or are not aware of them, please indicate. [ROTATE A-C]

- A. Publication 4671 - VITA Grant 2012 Program Overview and Application Package
- B. Publication 4680 - VITA Grant Program brochure
- C. IRS VITA Grant Program pages on IRS.gov

05 Very satisfied

04

03

02

01 Very dissatisfied

06 [Not applicable/Have not used/No experience]



07 [Unaware product/service was available]

///ASK IF Q19= 01///

Q22. How can IRS use to improve communication about the VITA Grant program application and reporting process?

[Record verbatim]

## VII. Partner and Volunteer Resource Center on IRS.gov

///ASK IF S3=02///

Next, we would like to ask about the online resources available for partners at www.irs.gov.

Q23. Are you aware of the Outreach Corner, a free email subscription where we send a monthly email linking to electronic communication materials for you to use in reaching out to the people you serve?

01 Yes

02 No

///ASK IF S3=02///

Q24. Have you subscribed to receive e-mails from the Outreach Corner?

01 Yes

02 No

///ASK IF Q24 = 02///

Q25. What are the main reasons you have not subscribed to the Outreach Corner? [Select all that apply]

1 Not aware I could subscribe

02 Don't want more e-mail

03 Information provided by the Outreach Corner is not useful

04 Other

///ASK IF Q23 = 01///

Q26. Overall, how satisfied are you with the following materials available on the Outreach Corner?

A. DROP IN ARTICLES

B. WEB TOOLS / WIDGETS

C. FLYERS/BROCHURES

D. AUDIO/VIDEO

05 Very satisfied

04

03

02

01 Very dissatisfied

06 [Have not used]

07 [Unaware product/service was available]

///ASK IF S3=02///

Q27. What other drop-in articles does the IRS need to develop on tax topics that would help you to reach out to your customers?

[Record verbatim]

### VIII. Marketing Products and Materials

///ASK IF Q1 = 03,06,07, ELSE SKIP TO SECTION X///

Q28. Next, think 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///

Q29. 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 Q29 = 04,05///

Q30. 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 Q1 = 03,06,07///

Q31. Does SPEC need to develop other types of marketing materials to assist with your outreach efforts?

01 Yes

02 No

///ASK IF Q31. = 01///

Q32. What other types of marketing materials would be helpful for you?

[RECORD VERBATIM]

///ASK IF Q1=03,06,07 AND Q28=01,02,03,04,05///

Q33. 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]

///ASK IF Q33 = 01,02///

Q34. Why are you dissatisfied with the marketing products and materials provided by SPEC?

[Record verbatim]

#### IX. Quality Improvement Process

///ASK IF Q1 = 01,02,04,05,07///

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

Q35. 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?

///ASK IF Q1 = 01,02,04,05,07///

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

[IF Q1 = 05, ASK A & C ONLY]

- A. Form 13614C - Intake & Interview Sheet
- B. Publication 1084 - Volunteer Site Coordinator's Handbook
- C. 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 Q35C = 04 or 05///

Q36. What did you like about the VITA Hotline?

[Record verbatim]

///ASK IF Q35C = 01 or 02///

Q37. Why were you dissatisfied with the VITA Hotline?

[Record verbatim]

///ASK IF Q1 = 01,02,04,05,07///

Q38. Did SPEC provide guidance material to assist with the privacy, confidentiality and security of taxpayer data?

01 Yes

02 No

///ASK IF Q1 = 01,02,04,05,07///

Q39. 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]

#### X. Partner Conference Calls

///ASK IF Q1 = 01,02,04,05,07 AND respondent is a partner from Area 1 or Area 2 (from Area variable in database)///

Q40. In the last year, did you attend any of the monthly conference calls SPEC hosts with partners on tax topics and best practices?

01 Yes

02 No

07 [Unaware product/service was available]

///ASK IF Q40 = 01///

Q41. How satisfied are you with the following aspects of these conference calls?

A. Tax Topics presented

B. Partner presentations

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 AND respondent is a partner from Area 1 or Area 2 (from Area variable in database///

Q42.. Do you plan on attending any of the monthly conference calls in the next year?

- 01 Yes
- 02 No

///ASK IF Q1 = 01,02,04,05,07 AND respondent is a partner from Area 1 or Area 2 (from Area variable in database///

Q43. How can IRS make these calls more beneficial to you or your organization?  
[Record verbatim]

## **XI. Overall Satisfaction**

///ASK IF S3=02///

Q44. 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///

Q45. 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 Q45=05///

Q46. Why do you say you are more satisfied overall with SPEC this year compared to last year?

[Record verbatim]

///ASK IF Q45=03///

Q47. Why do you say you are less satisfied overall with SPEC this year compared to last year?

[Record verbatim]

///ASK IF S3=02///

Q48. 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

## 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.

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

Q49. Are you familiar with EITC's marketing campaign slogan "Life's a little easier with EITC"?

01 Yes

02 No

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

Q50. 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///

Q51. 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-C; D AND E SHOULD ALWAYS BE ASKED LAST]

- A. Publication 962 series – Stuffers in English, Spanish and evergreen with EITC basic eligibility requirements.
- B. Publication 4298 – Bus card displayed on public transportation vehicles to market three IRS programs to taxpayers: EITC, Child Tax Credit, and e-File.
- C. Publication 3524 series – EITC eligibility checklist in both English and Spanish
- D. Other IRS provided EITC publications.
- E. EITC publications not provided by the IRS.

01 Yes

02 No

///ASK IF Q51D OR Q51E = 01///

Q52. 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

///ASK IF Q52 = 01///

Q53. 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///

Q54. 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 including customizable communication products

- 05 Once Daily
- 04 Once Weekly
- 03 Once Monthly
- 02 Occasionally
- 01 Never
- 07 [Unaware product/service was available]

[Programmer: Q54A, 54B, and 54C 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 Q55 will be asked or not.]

[If Q54A = 02,03,04,05                      Ask Q55A]  
[If Q54A = 01,07                              Do not ask Q55A]

[If Q54B = 02,03,04,05                      Ask Q55B]  
[If Q54B = 01,07                              Do not ask Q55B]

[If Q54C = 02,03,04,05                      Ask Q55C]  
[If Q54C = 01,07                              Do not ask Q55C]

Q55. 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)
- B. EITC Assistant on [irs.gov](http://irs.gov) in either English or Spanish

C. 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]

### XIII. IRS Publications and Forms

///ASK IF Q1 = 01,02,04,05,07///

We're almost through. For our final questions, we'd like to ask about a few of the IRS tax forms and publications that you may use which were created and distributed by IRS Media and Publications organization.

Q56. Thinking about the following tax forms and publications you may have used this year, on a scale of 1 to 5, with 5 being very satisfied and 1 being very dissatisfied, how satisfied are you with... [ROTATE A-F]

A. Publication 17, Your Federal Income Tax (For Individuals)

B. Schedule Earned Income Credit

C. Schedule A, Itemized Deductions

D. Form 8812, Additional Child Tax Credit

E. Form 8888, Allocation of Refund (Including Savings Bond Purchases)

F. Form 2441, Child and Dependent Care Expenses

05 Very satisfied

04

03

02

01 Very dissatisfied

06 [Not applicable/Have not used/No experience]

07 [Unaware product/service was available]

///ASK FOR EACH Q56 A-F = 01,02///

Q57. Why were you unsatisfied with the (Q33 Product A-F) ?

[Record verbatim]

///ASK IF Q1 = 01,02,04,05,07///

Q58. Please indicate how frequently you use the following chapters in Publication 17, Your Federal Income Tax, during this year?

A. The Income Tax Return – including filing status, personal exemptions and dependents



- B. Income – including wages, tips, dividends pensions and social security income etc
- C. Gains and Losses - including basis of property, selling your home, gain and losses, etc
- D. Adjustments to Income - including alimony, IRAs and education related adjustments
- E. Standard Deduction and Itemized Deductions - including medical care, interest deductions and taxes, etc
- F. Figuring Your Taxes and Credits - including child and dependent care expenses, earned income credit, education credits, etc)

- 05 Very Frequently (More than once a week) []
- 04 Frequently (Once a week)
- 03 Occasionally (Once or twice a month)
- 02 Rarely (Once or twice during the filing season)
- 01 Never
- 06 Not applicable/Have not used/No experience]
- 07 [Unaware product/service was available]

///ASK IF Q1 = 01,02,04,05,07///

Q59. Overall, how would you rate the IRS on forms, instructions, publications and other tax products that it develops, produces and distributes to taxpayers? 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]

#### XIV. Close

///ASK IF S3=02///

CLOSE1.

#### 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

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

By clicking “Next”, you are submitting your responses for the 2012 Partner Satisfaction Survey.

You will not be able to change your responses or re-enter the survey after clicking "Next" on this page.

## Local Partner Survey Pre-Notification E-Mail

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

To: [Local Partner E-Mail address]

Subject: 2012 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 The Contractor, 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.

Capturing your feedback is very important to the IRS. Your participation in this survey is critical in helping us improve our products and services to all of our local partners. The 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 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.

Michael Beebe  
Director  
Stakeholder Partnerships, Education and Communication

## Local Partner Survey Initial Invitation E-Mail

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

To: [e-mail address]

Subject: 2012 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 2011/2012. To do this, we invite you to participate in the 2012 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.

The Contractor, an independent consulting firm, is administering this survey via the Internet. The 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 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 20 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. The Contractor will not share these passwords with the IRS at any time during or after this study.

Please complete this survey no later than Saturday, March 31, 2012. If you have any questions about the survey administration or are having problems accessing the survey, please contact Settle, Sherri [[sSettle@icfi.com](mailto:sSettle@icfi.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

## Local Partner Survey Reminder E-Mail

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

To: [e-mail address]

Subject: Reminder: 2012 IRS SPEC Partner Satisfaction Survey

Dear IRS SPEC Partner:

Recently you should have received an e-mail message from The Contractor asking for your participation in the 2012 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 Thursday, March 31, 2012. 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 20 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. The Contractor 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 The Contractor at [IRS.SPEC.Partners@icfi.com](mailto:IRS.SPEC.Partners@icfi.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



## Local Partner Survey Final Reminder E-Mail

From: [\\_IRS.SPEC.Partners@icfi.com\]](mailto:IRS.SPEC.Partners@icfi.com)

To: [e-mail address]

Subject: Final Reminder: 2012 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 2012 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 Saturday, March 31, 2012. 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 less than 20 minutes.

If you have any questions about the survey administration or are having problems accessing the survey, please contact Sherri Settle at [IRS.SPEC.Partners@icfi.com](mailto:IRS.SPEC.Partners@icfi.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