

## 2016 SPEC Partner Survey

Thank you for participating in the IRS's Stakeholder Partnerships, Education and Communication (SPEC) organization's 2016 Partner Satisfaction Survey. This survey covers your satisfaction as a local or national partner who works with SPEC on outreach, education, return preparation, and other tax assistance programs provided by SPEC within the past 12 months. The feedback collected from this survey will be used to identify areas of improvement for the SPEC program. Providing information is voluntary. The survey is expected to take approximately 15 minutes or less to complete.

Fors Marsh Group LLC, an independent research firm, is conducting this survey on behalf of SPEC. Fors Marsh Group 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.

You may suspend the survey at any time by clicking the **SAVE & QUIT** button at the bottom of the page. You may reset the answers for the page you are on by clicking the **CLEAR** button at the bottom of the page. Please do not use your survey browser's "Back" button to access questions that you have already answered, as this could cause issues capturing your data.

You may re-enter the survey where you left off by clicking on the survey link. At the end of the survey, please click the **SUBMIT SURVEY** button to submit your responses.

If you are experiencing any issues, please feel free to contact us at: [SPECSurvey@forsmarshgroup.com](mailto:SPECSurvey@forsmarshgroup.com)

### ///REQUIRED: HARD PROMPT///

**S1.** Are you the person at **[INSERT ORGANIZATION (PartnerName field)]** who manages or interacts with SPEC and 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 feedback, would you please record his/her name and email address below so that we could contact him/her for feedback in the future?

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 X]

///REQUIRED: HARD PROMPT///

///ASK IF S1=01///

- S3. Are you an IRS 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 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 his/her name and email address below so that we could contact him/her for feedback in the future?

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 X]

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#### PROGRAMMING NOTES: Group Numbers

Throughout the survey, survey sections are administered to different groups of respondents. Respondents who receive each question (or section) are identified following each question or section header. The Group Numbers are as follows:

- Group 1 = Return Prep (QDEM\_1 = 1, 2, 4, or 5)
- Group 2 = Outreach (QDEM\_1 = 3)
- Group 3 = Asset Building (QDEM\_1 = 6)
- Group 4 = National (this will be noted in data sample file)
- Group 5 = Other (QDEM\_1 = 7)

**I. Introduction**

///Groups = ALL///

Please keep in mind that this discussion will only be about your experiences with SPEC over the past 12 months and not with any interactions you might have had with other parts of the IRS. The first set of questions pertains to the nature of your relationship with SPEC and the customers you serve.

SINGLE PUNCH ANSWER

**QINTRO\_1.** Overall, how satisfied were you with SPEC’s products and services?

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Very Dissatisfied</b>	<b>Dissatisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Satisfied</b>	<b>Very Satisfied</b>

///ASK IF QINTRO\_1=04, 05, ELSE SKIP ///

OPEN ENDED QUESTION

**QINTRO\_2.** You indicated that you were satisfied; can you please provide more detail about why you were satisfied with SPEC’s products and services?

[TEXT BOX]

99 Refused

///ASK IF QINTRO\_1=01, 02, 03 ELSE SKIP ///

OPEN ENDED QUESTION

**QINTRO\_3.** You indicated that you were not satisfied; can you please provide more detail about why you were not satisfied with SPEC’s products and services?

[TEXT BOX]

99 Refused

///Groups = ALL///

SINGLE PUNCH ANSWER

**QINTRO\_4.** How likely are you to recommend partnering with SPEC to other organizations or colleagues?

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Very Unlikely</b>	<b>Unlikely</b>	<b>Neither Likely nor Unlikely</b>	<b>Likely</b>	<b>Very Likely</b>

///Groups = ALL//

SINGLE PUNCH ANSWER

**QINTRO\_5.** Given your experience, how likely are you to continue partnering with SPEC next year?

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Very Unlikely</b>	<b>Unlikely</b>	<b>Neither Likely nor Unlikely</b>	<b>Likely</b>	<b>Very Likely</b>

**II. Market Segments and Demographics**

**///Groups ≠ 4///**

**SINGLE PUNCH ANSWER**

**QDEM\_1.** What was your primary area of advocacy as a partner or coalition? Again, we're interested in the scope of emphasis of the organization you represent, which might 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 Tax Aide
- 06 Asset Building, such as financial education, funding, or wealth building
- 07 Other (please specify) **[TEXT BOX]**

**///Groups = ALL///**

**YES/NO GRID QUESTION**

**QDEM\_2.** Which of the following types of customers did your partner or coalition serve frequently?

- QDEM\_2A.** Low to Moderate Income
- QDEM\_2B.** Seniors
- QDEM\_2C.** Military
- QDEM\_2I.** Veterans
- QDEM\_2D.** People with Disabilities
- QDEM\_2E.** Rural
- QDEM\_2F.** American Indian or Alaska Native
- QDEM\_2G.** Limited English Proficient
- QDEM\_2H.** Other: please specify **[TEXT BOX]**

<b>01</b>	<b>02</b>
<b>Yes</b>	<b>No</b>

**///Groups = ALL///**

**OPEN ENDED QUESTION**

**QDEM\_3.** For how many years has your partner or coalition provided return preparation, outreach, education, or other tax assistance as a SPEC partner?

\_\_\_\_ years [1-50] **[TEXT BOX]**

**///Groups = ALL///**

**YES/NO GRID QUESTION**

**QDEM\_4.** In which of the following financial education and asset building areas did your partner or coalition offer outreach and education?

- QDEM\_4A.** Savings Bonds
- QDEM\_4B.** Individual Development Accounts
- QDEM\_4C.** Banking Deposit Accounts
- QDEM\_4D.** Credit Unions: Deposit Accounts
- QDEM\_4E.** Credit Counseling and Repair
- QDEM\_4F.** Home Ownership Foreclosure Programs
- QDEM\_4G.** Budgeting/Life Events/Financial Programs
- QDEM\_4H.** Privacy, Fraud Scams: Consumer Protection/Identity Theft
- QDEM\_4I.** Tax Compliance: Balance Due/Counseling/Payment Options
- QDEM\_4J.** Tax Compliance: Foreclosures/Debt Forgiveness
- QDEM\_4K.** MyRA (my Retirement Account)
- QDEM\_4L.** Other: please specify **[TEXT BOX]**

<b>01</b>	<b>02</b>
<b>Yes</b>	<b>No</b>

**///ASK IF QDEM\_4A-L=01, ELSE SKIP ///**

**QDEM\_5A\_L.** How satisfied were you with the guidance and assistance you received from SPEC regarding...?

[Insert for each QDEM\_4A-L =01]

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Very Dissatisfied</b>	<b>Dissatisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Satisfied</b>	<b>Very Satisfied</b>

**///ASK IF Any QDEM\_5A-L=01, 02, 03, ELSE SKIP ///**

**OPEN ENDED QUESTION**

**QDEM\_6.** You indicated that you were not satisfied with some of the SPEC financial education and asset building resources; can you please describe how these resources could be improved?

**[TEXT BOX]**

99 Refused

**III. Relationship Manager and Support**

///Section- Groups = ALL///

We would now like to ask you about your experience and satisfaction with the SPEC employee point of contact or relationship manager assigned to assist you or your coalition.

SINGLE PUNCH ANSWER

**QRM\_1.** Overall, how satisfied were you with your SPEC employee point of contact or relationship manager?

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Very Dissatisfied</b>	<b>Dissatisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Satisfied</b>	<b>Very Satisfied</b>

///Group = ALL ///

GRID QUESTION

[ROTATE A-C]

**QRM\_2.** How satisfied were you with your SPEC employee point of contact or relationship manager's...?

- QRM\_2A.** Professionalism
- QRM\_2B.** Proactiveness
- QRM\_2C.** Responsiveness to requests

<b>01</b>	<b>02</b>	<b>03</b>	<b>04</b>	<b>05</b>
<b>Very Dissatisfied</b>	<b>Dissatisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Satisfied</b>	<b>Very Satisfied</b>

///Group = ALL ///

GRID QUESTION

[ROTATE A-F]

**QRM\_3.** How satisfied were you with the guidance and assistance you received from your SPEC employee point of contact or relationship manager regarding...?

- QRM\_3A.** Reviewing or assisting with your training plans
- QRM\_3B.** Providing information or data on potential outreach recipients in the community
- QRM\_3C.** Providing reports and data on your partner or coalition's return preparation activities
- QRM\_3D.** Providing reports and data to assist you in determining the impact of your program in the community
- QRM\_3E.** Providing details on site operation requirements
- QRM\_3F.** Facilitation of quality improvement processes

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>98</b>
<b>Very Dissatisfied</b>	<b>Dissatisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Satisfied</b>	<b>Very Satisfied</b>	<b>Not applicable/Unaware product or service was available</b>

///Group = ALL ///

SINGLE PUNCH ANSWER

**QRM\_4** Overall, how well did your SPEC employee point of contact or relationship manager meet your expectations during this filing season?

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Much Worse than Expected</b>	<b>Worse than Expected</b>	<b>As Expected</b>	<b>Better than Expected</b>	<b>Much Better than Expected</b>

///ASK IF Any QRM\_4=01, 02, ELSE SKIP ///

OPEN ENDED QUESTION

**QRM\_5.** You indicated that your expectations were not met; how can SPEC's employee point of contact or relationship manager better meet your expectations?

[TEXT BOX]

99 Refused



**IV. Resources and Support**

///Section- Groups = ALL///

///ASK Groups=ALL ///

GRID QUESTION

[ROTATE 1A-K]

**QRes\_1.** Are you aware of the following resources?

- QRes\_1A.** Outreach Corner on IRS.gov
- QRes\_1B.** Partner and Volunteer Resource Center (online)
- QRes\_1C.** IRS New Media/Social Media Messaging Resources
- QRes\_1D.** Pub 5220, VITA/TCE Volunteer Site Scope & Referral Chart
- QRes\_1E.** VITA and TCE Grants
- QRes\_1F.** Volunteer awards and recognition program
- QRes\_1G.** EITC Central
- QRes\_1H.** EITC free publications
- QRes\_1I.** EITC free marketing materials
- QRes\_1J.** EITC Banner Ads
- QRes\_1K.** Pub 4935, Guide to Everything Earned Income Tax Credit for Individuals Online

<b>01</b>	<b>02</b>
<b>Yes</b>	<b>No</b>

///ASK if any QRes\_1A-K =01, else skip ///

**QRes\_2A.** Have you used the following resource(s)...?

[insert for each QRes\_1A-K =01]

<b>01</b>	<b>02</b>
<b>Yes</b>	<b>No</b>

///ASK if any QRes\_2A-K=01, else skip ///

**QRes\_3.** How satisfied were you with the following resource(s):

[insert for each QRes\_2A-K=01]

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Very Dissatisfied</b>	<b>Dissatisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Satisfied</b>	<b>Very Satisfied</b>

**///Group = ALL ///**  
**SINGLE PUNCH ANSWER**

**QRes\_4.** How satisfied overall were you with SPEC products?

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Very Dissatisfied</b>	<b>Dissatisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Satisfied</b>	<b>Very Satisfied</b>

**V. ACA Related Questions**

///Groups = ALL///

**QACA\_1.** How satisfied were you with the materials and products provided by SPEC to support your ACA outreach efforts?

1	2	3	4	5	98
Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Not applicable/Unaware product or service was available

Ask ///IF QACA\_1 =01, 02, or 03 ELSE SKIP///

OPEN ENDED QUESTION

**QACA\_2.** You indicated that you were not satisfied with the SPEC-provided ACA outreach materials and products; how can SPEC improve these items?

[TEXT BOX]

99 Refused

///Section- Group 1, ELSE SKIP TO NEXT SECTION///

**QACA\_3.** How satisfied were you that the SPEC training and materials provided the knowledge you needed to prepare tax returns involving the...?

**QACA\_3A** Reporting of Minimum Essential Coverage

**QACA\_3B** Claiming of Health Coverage Exemption

**QACA\_3C** Shared Responsibility Payment

**QACA\_3D** Premium Tax Credit

1	2	3	4	5	98
Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Not applicable/Unaware product or service was available

**VI. Tax Law and E-file: Products and Services**

///Section- Group 1, ELSE SKIP TO NEXT SECTION///

Now we would like to ask you about your satisfaction with the tax law training your volunteers received. If you have no experience with the product/service or you are not aware that it is available, please choose *No training provided*.

**Multiple PUNCH ANSWER**

**QTL\_1. How did your volunteers receive tax law training?**

- QTL\_1\_1 Online training on Link & Learn Taxes
- QTL\_1\_2 Online training from partners
- QTL\_1\_3 Classroom/face-to-face training
- QTL\_1\_4 Self study
- QTL\_1\_5 Other: please specify [TEXT BOX]
- QTL\_1\_6 No training provided

///ASK FOR QTL\_1\_1-5 = 01///

**QTL\_2A-F.** Overall, how satisfied were you with...?

[Ask for each QTL\_1\_01 through 05 =01]

1	2	3	4	5
Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied

///ASK IF QTL\_2\_A=1/3, Else skip///

**OPEN ENDED QUESTION**

**QTL\_3.** You indicated that you were not satisfied with the online training on Link & Learn Taxes; can you please describe how the training might be improved?

[TEXT BOX]  
99 Refused

**GRID QUESTION**

**[ROTATE A-C]**

**QTL\_4.** We would now like you to rate your satisfaction with the products and materials used to e-file tax returns. If you have no experience with this product/service or you are not aware that it is available, please choose Not applicable/Unaware product or service was available.

How satisfied were you with these e-file products and materials?

**QTL\_4A.** TaxWise electronic filing software products

**QTL\_4B.** CCH Customer Support Line for TaxWise Software support

**QTL\_4C.** Publication 3189, Volunteer e-file Administration Guide

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>98</b>
<b>Very Dissatisfied</b>	<b>Dissatisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Satisfied</b>	<b>Very Satisfied</b>	<b>Not applicable/Unaware product or service was available</b>

**VII. Quality Improvement Process**

///**Section- Group = 1, ELSE SKIP TO NEXT SECTION //**

Now we would like to ask you about SPEC's VITA/TCE – Quality Improvement Process.

**GRID QUESTION**

**ROTATE A-D**

**[IF QDEM\_1 = 01, 02, 04, ASK A-D]**

**[IF QDEM\_1 = 05, ASK A, B, and D ONLY]**

**QQI\_1.** How satisfied were you with the following products developed to support the Quality Improvement Process?

**QQI\_1A.** Form 13614-C, Intake/Interview & Quality Review Sheet

**QQI\_1B.** Pub 4396A, Partner Resource Guide

**QQI\_1C.** Publication 1084, VITA/TCE IRS Volunteer Site Coordinator Handbook

**QQI\_1D.** Publication 4012, VITA/TCE Volunteer Resource Guide

1	2	3	4	5	98
Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Not applicable/Unaware product or service was available

**IF QQI\_1A, QQI\_1B, QQI\_1C, or QQI\_1D = 01, 02, 03 ELSE SKIP///OPEN ENDED QUESTION**

**QQI\_2.** You indicated that you were not satisfied with one or more Quality Improvement Process materials; can you please describe how SPEC might improve these?

**[TEXT BOX]**

99 Refused

**[ASK IF QDEM\_1 = 01, 02, 04]**

**SINGLE PUNCH ANSWER**

**QQI\_3.** Did SPEC provide adequate guidance to assist with the privacy and security of taxpayer data?

01 Yes

02 No

**[IF QDEM\_1 = 01, 02, 04, 05]**

**SINGLE PUNCH ANSWER**

**QQI\_4.** Overall, how satisfied were you with the guidance, tools, and support provided by SPEC to improve the quality of return preparation at volunteer sites?

1	2	3	4	5
Very Dissatisfied	Dissatisfied	Neither Satisfied	Satisfied	Very Satisfied

		<b>nor Dissatisfied</b>		
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**VIII. Future Planning Products and Services**

///**Groups = ALL**///

SINGLE PUNCH ANSWER

**QFP\_1.** Overall, how well did SPEC’s products and services meet your expectations during this filing season?

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Much Worse than Expected</b>	<b>Worse than Expected</b>	<b>As Expected</b>	<b>Better than Expected</b>	<b>Much Better than Expected</b>

GRID QUESTION

**[ROTATE A-E]**

**QFP\_2.** How well were your expectations met during this filing season for the following...?

**QFP\_2A.** Frequency of contact with SPEC employee point of contact or relationship manager

**QFP\_2B.** Financial education and asset-building resources and support

**QFP\_2C.** Training products and materials

**QFP\_2D.** E-file products and materials

**QFP\_2E.** Quality Improvement Process products and materials

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>98</b>
<b>Much Worse than Expected</b>	<b>Worse than Expected</b>	<b>As Expected</b>	<b>Better than Expected</b>	<b>Much Better than Expected</b>	<b>Not applicable/Unaware product or service was available</b>

**[ASK IF QFP\_2A-E= 1, 2, Else Skip]**

OPEN ENDED QUESTION

**QFP\_3.** You indicated that one or more of your expectations were not met this filing season; can you please describe how SPEC might improve to better meet your expectations?

**[TEXT BOX]**

99 Refused

///**Group 1, ELSE SKIP TO NEXT SECTION**///

Single Punch Answer

**QFP\_4.** SPEC introduced an assisted self-filing program that allows some taxpayers to complete their own tax return (using interview-based, name-brand software) with the help of an IRS-certified volunteer. By providing this self-filing option, partners can increase free tax preparation services in the communities they serve.



Are you aware of SPEC's Facilitated Self Assistance (FSA) program?

- 01 Yes
- 02 No

**///ASK IF QFP\_4 = 01, ELSE SKIP ///**

**QFP\_5.** Did you partner with SPEC to operate a Facilitated Self Assistance site this filing season?

- 01 Yes - I have FSA stations and volunteers onsite, but no remote access
- 02 Yes - I do not have workstations and volunteers onsite (clients must access the software and assistance remotely)
- 03 Yes - I have a combination of onsite and remote FSA options
- 04 No - I have not partnered with SPEC on FSA this filing season

**///ASK IF QFP\_5=01, 02, 03, ELSE SKIP///**

**QFP\_6.** How satisfied were you with the support you received from SPEC for Facilitated Self Assistance?

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Very Dissatisfied</b>	<b>Dissatisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Satisfied</b>	<b>Very Satisfied</b>

**/// Group 1///**

**Single Punch Answer**

**QFP\_7.** SPEC's Virtual VITA tax preparation model is a system that allows taxpayers to use technology to connect from a remote location or intake site and electronically interact with a volunteer preparer in a different location.

Are you aware of SPEC's Virtual VITA program?

- 01 Yes
- 02 No

**///ASK IF QFP\_7 = 01 ELSE SKIP ///**

**QFP\_8.** Did you partner with SPEC to operate a Virtual VITA site this filing season?

- 01 Yes
- 02 No

**///ASK IF QFP\_8=01, ELSE SKIP///**

**QFP\_9.** How satisfied were you with the support you received from SPEC for the Virtual VITA program?

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
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<b>Very Dissatisfied</b>	<b>Dissatisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Satisfied</b>	<b>Very Satisfied</b>
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**GRID QUESTION**

**/// Group 1///**

**QFP\_10.** How likely will you do each of the following next filing season?

**QFP\_10A.** Increase the number of volunteers

**QFP\_10B.** Increase the number of hours you are available to the public

**QFP\_10C.** Increase the number of sites

**QFP\_10D.** Incorporate Alternative Filing Options such as Facilitated Self Assistance (FSA) or Virtual VITA/TCE

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Very Unlikely</b>	<b>Unlikely</b>	<b>Neither Likely nor Unlikely</b>	<b>Likely</b>	<b>Very Likely</b>

**SINGLE PUNCH ANSWER**

**/// Group 1///**

**QFP\_11.** Do you plan on expanding your program to complete more tax returns next year?

01 Yes

02 No

98 Don't know

**///ASK IF QFP\_11 = 02, 03 ELSE SKIP ///**

**OPEN ENDED QUESTION**

**QFP\_12.** You have answered that you either do not plan to or are not sure if you will expand your program to complete more tax returns next year; can you please explain why you do not have plans to expand your program at this time?

**[TEXT BOX]**

99 Refused

**IX. IRS Publications and Forms**

**/// Group 1, ELSE SKIP to QMP\_5 ///**

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 might use that were created and distributed by IRS Media and Publications organization.

**GRID QUESTION**

**[ROTATE A-F]**

**QMP\_1.** Thinking about the following tax forms and publications you might have used this year, how satisfied are you with...?

**QMP\_1A.** Publication 17, Your Federal Income Tax (For Individuals)

**QMP\_1B.** Schedule EIC, Earned Income Credit

**QMP\_1C.** Schedule A, Itemized Deductions

**QMP\_1D.** Form 2441, Child and Dependent Care Expenses

**QMP\_1E.** Form 8962, Premium Tax Credit (PTC)

**QMP\_1F.** Form 8965, Health Coverage Exemptions

1	2	3	4	5	98
Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Not applicable/Unaware product or service was available

**/// Group 1 ///**

**SINGLE PUNCH ANSWER**

**QMP\_2.** Are you aware that the IRS has created tax publications in electronic format?

01 Yes - I used one or more to help prepare returns this filing season

02 Yes - I am aware, but did not use them this filing season

03 No

**///ASK IF QMP\_2 = 02 ELSE SKIP ///**

**OPEN ENDED QUESTION**

**QMP\_3.** You indicated that you are aware of IRS electronic publications, but did not use them this filing season; can you please explain why you did not use electronic publications?

**/// Group 1 ///**

**SINGLE PUNCH ANSWER**

**QMP\_4.** To what extent would only having an electronic version of Publication 17 negatively impact your ability to prepare returns?

01 It would have no negative impact

- 02 It would have a small negative impact
- 03 It would have a moderate negative impact
- 04 It would have a large negative impact

**/// ALL GROUPS///**

**SINGLE PUNCH ANSWER**

**QMP\_5.** IRS research is interested in better understanding partner opinions on electronic publications; are you willing to participate in further research? If you indicate you are willing to participate, your contact information will be separated from your survey responses.

- 01 Yes
- 02 No

**///ASK IF QMP\_5 = 01, ELSE SKIP ///**

**QMP\_6.** You indicated you are interested in participating in further research; please provide your email address for additional contact. Your email address will not be associated with your survey responses.

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

## X. Close

### 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, Special Services Committee, SE:W:CAR:MP:T:M:S – Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

That concludes this survey. On behalf of the IRS, SPEC, and Fors Marsh Group LLC, thank you very much for your participation.

By clicking “Submit Survey,” you are submitting your responses for the 2016 Partner Satisfaction Survey. You will not be able to change your responses or re-enter the survey after clicking “Submit Survey” on this page.

## SPEC Partner Survey Pre-Notification Email

From: Email address

To: [Partner Email address]

Subject: 2016 IRS SPEC Partner Satisfaction Survey

Dear IRS SPEC Partner:

As a partner with the IRS Stakeholder Partnerships, Education and Communication (SPEC) office, your feedback is very important to us. Within the next few days, you will receive an email from our survey administrator, Fors Marsh Group, LLC, inviting you to complete a brief survey to provide your feedback about the products and services you receive from SPEC.

Your participation in this survey is critical in helping us improve our products and services. Fors Marsh Group will not provide us with any information that will identify you individually and will hold your identity private to the extent permitted by law. Your responses will be provided to us in aggregate only.

To verify the authenticity of this survey, please visit [IRS.gov](http://IRS.gov) and enter the search term 'customer surveys'. The "IRS Customer Satisfaction Survey" page contains a list of current valid IRS surveys and should provide a reference to this survey, the "W&I: CARE: Stakeholder Partnership, Education and Communication – SPEC Partner."

If you have any questions, please contact Ravi Patel, on SPEC's Products, Systems and Analysis Team at (404) 338-8749 or your IRS Relationship Manager.

Thank you in advance for your participation.

**Frank A. Nolden**

Director

Stakeholder Partnerships, Education and Communication (SPEC)

## SPEC Partner Survey Initial Invitation Email

From: [email](#) address

To: [email address]

Subject: 2016 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 its valued partners, to help determine where to focus its attention in 2016/2017. To do this, we invite you to participate in the 2016 SPEC Partner Satisfaction Survey. This web-based survey can be easily completed online at your convenience. Your participation will help SPEC direct efforts and resources to the programs needing them the most.

The primary purpose for requesting this information is to help the IRS improve its service to taxpayers. Our authority for requesting the information is 5 USC and 26 USC 7801. Providing information is voluntary. However, if you do not answer all or part of the survey questions, the IRS might lack information it could use to improve taxpayer service. The information you provide may be disclosed to an IRS contractor when authorized by law. The contractor is required to follow privacy protections to the extent allowed by law.

Fors Marsh Group is an independent consulting firm that is administering this survey via the internet. We 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 online 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 it 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. Fors Marsh Group will not share these passwords with the IRS at any time during or after this study.

Please complete this survey no later than Monday, XX-XX-XXXX. If you have any questions about the survey administration or are having problems accessing the survey, please feel free to contact us at [SPECSurvey@forsmarshgroup.com](mailto:SPECSurvey@forsmarshgroup.com).

To verify the authenticity of this survey, please visit IRS.gov and enter the search term 'customer surveys'. The “IRS Customer Satisfaction Survey” page contains a list of current valid IRS surveys and should provide a reference to this survey, the “W&I: CARE: Stakeholder Partnership, Education and Communication – SPEC Partner.”

If you have any general questions about the nature of the study, please contact Ravi Patel, in the SPEC Products, Systems and Analysis Office at (404) 338-8749 or [Ravi.A.Patel@irs.gov](mailto:Ravi.A.Patel@irs.gov).

**OMB #1545-1432**

Thank you in advance for your participation.

Brian Griepentrog, PhD  
Director of Research  
Fors Marsh Group, LLC



## SPEC Partner Survey Reminder Email

From: TBD.com

To: [email address]

Subject: Reminder: 2016 IRS SPEC Partner Satisfaction Survey

Dear IRS SPEC Partner:

Recently you should have received an email message asking for your participation in the 2016 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 cutoff date is Monday, XX-XX-XXXX.

The survey is located online at [Hyperlink]

The survey is voluntary and 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 it 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. Fors Marsh Group will not share these passwords with the IRS at any time during or after this study. To verify the authenticity of this survey, please visit IRS.gov and enter the search term 'customer surveys'. The "IRS Customer Satisfaction Survey" page contains a list of current valid IRS surveys and should provide a reference to this survey, the "W&I: CARE: Stakeholder Partnership, Education and Communication – SPEC Partner."

If you have any questions about the survey administration or are having problems accessing the survey, please feel free to contact us at [SPECSurvey@forsmarshgroup.com](mailto:SPECSurvey@forsmarshgroup.com).

If you have any general questions about the nature of the study, please contact Ravi Patel, in the SPEC Products, Systems and Analysis Office at (404) 338-8749 or [Ravi.A.Patel@irs.gov](mailto:Ravi.A.Patel@irs.gov).

Thank you in advance for your participation.

Brian Griepentrog, PhD  
Director of Research  
Fors Marsh Group, LLC

## SPEC Partner Survey Final Reminder Email

From: TBD.com

To: [e-mail address]

Subject: Final Reminder: 2016 IRS SPEC Partner Satisfaction Survey

Dear IRS SPEC Partner:

You might just have overlooked our earlier email message asking for your participation in the 2016 IRS SPEC Partner Satisfaction Survey. Or, you might 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.

The cutoff date for you to complete the survey is Monday, XX-XX-XXXX. If you have already started the survey, it will resume exactly where you left off with all of your previous responses saved.

Your survey is located online at [Hyperlink]

The survey is voluntary and should take less than 15 minutes.

To verify the authenticity of this survey, please visit [IRS.gov](http://IRS.gov) and enter the search term 'customer surveys'. The "IRS Customer Satisfaction Survey" page contains a list of current valid IRS surveys and should provide a reference to this survey, the "W&I: CARE: Stakeholder Partnership, Education and Communication – SPEC Partner."

If you have any questions about the survey administration or are having problems accessing the survey, please feel free to contact us at [SPECSurvey@forsmarshgroup.com](mailto:SPECSurvey@forsmarshgroup.com).

If you have any general questions about the nature of the study, please contact Ravi Patel, in the SPEC Products, Systems and Analysis Office at (404) 338-8749 or [Ravi.A. Patel@irs.gov](mailto:Ravi.A.Patel@irs.gov).

Thank you and I look forward to receiving your feedback.

Brian Griepentrog, PhD  
Director of Research  
Fors Marsh Group, LLCC