

SPEC Volunteer Tax Assistance Survey



Paperwork Reduction Act

The Paperwork Reduction Act requires the IRS provide an Office of Management and Budget (OMB) control number for all public information requests. The OMB Control Number for this survey is 1545-1432. Participation in this survey is voluntary, and we estimate it will take approximately 15 minutes to complete. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:

Internal Revenue Service
Special Services Section
SE:W:CAR:MP:T:M:S – Room 6129
1111 Constitution Ave. NW
Washington, DC 20224

Form **15405 (OS)** (6-2023) Catalog Number 93846A OMB Number 1545-1432 Department of the Treasury - Internal Revenue Service

Introduction

Through their participation in programs like the Volunteer Income Tax Assistance program (VITA) and Tax Counseling for the Elderly (TCE), volunteers are the backbone of the IRS free tax preparation and filing assistance program. They assist taxpayers in underserved communities who might otherwise pay for tax preparation or make errors during self-preparation. The purpose of this study is to determine volunteers' level of satisfaction with the program and improve taxpayer services.

We estimate it will take approximately 15 minutes to complete this survey, including the time to review instructions. Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes. Your identity will be protected to the extent of the law. Providing information is voluntary, and you need not answer every question. Not providing some of the requested information will have no impact on you but may reduce our ability to address volunteers' concerns regarding IRS tax preparation services.

Some who were interested in helping others prepare their taxes actually volunteered, while others started the process but did not volunteer. Insights from both sets of volunteers are important to improve the volunteer experience and taxpayer services. We appreciate your feedback.

Initial Interest

1. Which of the following statements describe your experience? Select all that apply.
 - a. I signed up to volunteer through IRS.gov.
 - b. I received a follow-up email with information about community organizations or sites where I could volunteer from the IRS after signing up.
 - c. I attended a webinar provided by the IRS that gave an overview of the Volunteer program.
 - d. I received tax preparation training via the IRS Link & Learn Taxes program.
 - e. I received additional training, outside of Link & Learn Taxes, at a community organization or site where I wanted to volunteer.
 - f. I connected with a community organization or site where I wanted to volunteer.
 - g. I volunteered with at least one community organization or site.

Sign-Up

2. **IF SIGNED UP IN Q1 (Q1=A):** Please rate your experience with regard to the following aspects of signing up on IRS.gov to become a volunteer.

| | <i>Very Satisfied</i> | <i>Satisfied</i> | <i>Neither Satisfied nor Dissatisfied</i> | <i>Dissatisfied</i> | <i>Very Dissatisfied</i> | <i>Not Applicable</i> | <i>I Do Not Remember</i> |
|--------------------------------------------------------------------------------------------------------|-----------------------|------------------|-------------------------------------------|---------------------|--------------------------|-----------------------|--------------------------|
| The volunteer signup on IRS.gov was simple to find. | | | | | | | |
| IRS.gov had enough information to help me learn about volunteering to help taxpayers with their taxes. | | | | | | | |
| Signing up on IRS.gov was a quick process. | | | | | | | |

3. **IF SIGNED UP IN Q1 (Q1=A):** How would you rate your overall experience with using IRS.gov to sign up to become a volunteer?

- a. Very Satisfied
 - b. Satisfied
 - c. Neither Satisfied nor Dissatisfied
 - d. Dissatisfied
 - e. Very Dissatisfied
 - f. Not Applicable
4. **IF SIGNED-UP IN Q1 (Q1=A):** How useful was the information in the follow-up email you received from the IRS?
- a. Very Useful
 - b. Somewhat Useful
 - c. Not Too Useful
 - d. Not Useful at All
 - e. Did Not Receive a Follow-up Email
 - f. Not Applicable
 - g. I Don't Remember
- IF E, F, OR G - SKIP TO Q6.**
5. **IF SIGNED-UP IN Q1 (Q1=A):** After signing up, which of the following best describes how long it took to receive information about any next steps?
- a. Took an appropriate amount of time to hear back
 - b. Took a little too long to hear back
 - c. Took far too long to hear back
 - d. Never heard back
 - e. Don't recall

Volunteer Orientation Webinar

6. **IF DID NOT ATTEND A WEBINAR IN Q1 (Q1≠C):** You noted you did not attend a Volunteer Orientation Webinar. Which of the following reasons best explains why you did not attend the orientation? Select all that apply.
- a. It did not work for my schedule
 - b. I did not feel it was necessary
 - c. My level of interest changed
 - d. It wasn't at a convenient location
 - e. I was not clear on the details of the orientation

- f. I had attended orientations or similar training in the past
- g. I was unaware of the requirements around an orientation
- h. Other (specify) _____

7. **IF ATTENDED A WEBINAR IN Q1 (Q1=C):** Please rate your experience with regard to the IRS Volunteer Orientation Webinar that gives an overview of the VITA/TCE volunteer program.

| | <i>Very Satisfied</i> | <i>Satisfied</i> | <i>Neither Satisfied nor Dissatisfied</i> | <i>Dissatisfied</i> | <i>Very Dissatisfied</i> | <i>Not Applicable</i> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------------|-------------------------------------------|---------------------|--------------------------|-----------------------|
| The content reviewed in the orientation made me confident I would be an effective volunteer. | | | | | | |
| My questions were answered during the orientation. | | | | | | |
| The orientation motivated me to continue the volunteer process. | | | | | | |
| The content covered in the orientation was a good representation of what the volunteer program was actually like. (If you did not volunteer, please select "Not Applicable.") | | | | | | |

8. **IF ATTENDED WEBINAR IN Q1 (Q1=C):** Did the Volunteer Orientation Webinar make you...

- a. Much more interested in volunteering
- b. More interested in volunteering
- c. As interested in volunteering
- d. Less interested in volunteering
- e. Much less interested in volunteering

9. **IF ATTENDED WEBINAR IN Q1 (Q1=C):** How would you rate your overall experience with the Volunteer Orientation Webinar?
- a. Very Satisfied
 - b. Satisfied
 - c. Neither Satisfied nor Dissatisfied
 - d. Dissatisfied
 - e. Very Dissatisfied
 - f. Not Applicable

Training (Link & Learn Taxes + Additional Training)

10. **IF RESPONDENT COMPLETED THE LINK & LEARN TRAINING IN Q1 (Q1=D):**
Please rate your experience with regard to the IRS Link & Learn Taxes training.

| | <i>Very Satisfied</i> | <i>Satisfied</i> | <i>Neither Satisfied nor Dissatisfied</i> | <i>Dissatisfied</i> | <i>Very Dissatisfied</i> | <i>Not Applicable</i> |
|---------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------------|-------------------------------------------|---------------------|--------------------------|-----------------------|
| The training accurately reflected what I'd be doing as a volunteer. (If you did not volunteer, please select "not applicable.") | | | | | | |
| The level of support received as needed | | | | | | |
| Clarity on what to study to pass the exams | | | | | | |
| The quality of the materials provided by the IRS | | | | | | |
| How confident the training made me feel as a potential volunteer | | | | | | |

11. **IF RESPONDENT COMPLETED THE LINK & LEARN TRAINING IN Q1 (Q1=D):**
How easy was it to figure out what you needed to do to pass the Link & Learn Taxes exam?
- a. Very easy

- b. Somewhat easy
- c. Neither easy nor difficult
- d. Somewhat difficult
- e. Very difficult
- f. Not applicable

12. **IF SOMEWHAT OR VERY DIFFICULT IN Q11:** What would have made it easier to understand what you needed to do to pass the Link & Learn Taxes training?

Text box for the open answer. Open-ended

13. **IF RESPONDENT COMPLETED THE LINK & LEARN TRAINING IN Q1 (Q1=D):** How would you rate your overall experience with the Link & Learn Taxes training from the IRS?

- a. Very Satisfied
- b. Satisfied
- c. Neither Satisfied nor Dissatisfied
- d. Dissatisfied
- e. Very Dissatisfied
- f. Not Applicable

14. **IF RECEIVED ADDITIONAL TRAINING IN Q1 (Q1=E):** Please rate your experience with regard to training at a community partner or site, outside of the IRS' Link & Learn training.

| | <i>Very Satisfied</i> | <i>Satisfied</i> | <i>Neither Satisfied nor Dissatisfied</i> | <i>Dissatisfied</i> | <i>Very Dissatisfied</i> | <i>Not Applicable</i> |
|---------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------------|-------------------------------------------|---------------------|--------------------------|-----------------------|
| The training accurately reflected what I'd be doing as a volunteer. (If you did not volunteer, please select "not applicable.") | | | | | | |
| How knowledgeable my instructor was | | | | | | |
| Accessibility of my instructor | | | | | | |

| | | | | | | |
|------------------------------------------------------------------|--|--|--|--|--|--|
| | | | | | | |
| My instructor's ability to teach the material | | | | | | |
| The level of support received as needed | | | | | | |
| How confident the training made me feel as a potential volunteer | | | | | | |

TEXT RECEIVED BY ALL: Two terms appear in the rest of this survey: "Community Partner" and "Site Coordinator." "Community Partner" refers to the organization that provides the physical space and technology volunteers use. "Site Coordinator" refers to an individual who leads the site, verifies all volunteers are certified to prepare tax returns, and follows all site operating procedures.

15. **IF RECEIVED ADDITIONAL TRAINING IN Q1 (Q1=E):** How would you rate any additional volunteer training you may have received from your Community Partner or Site Coordinator?
- a. Very Satisfied
 - b. Satisfied
 - c. Neither Satisfied nor Dissatisfied
 - d. Dissatisfied
 - e. Very Dissatisfied
 - f. Not Applicable

Partner/Volunteer Coordination

16. **IF RECEIVED INFORMATION AND DID NOT VOLUNTEER IN Q1 (Q1≠G AND Q1=B):** Please explain why you decided not to volunteer after receiving information about sites where you might volunteer.

Text box for the open answer. Open-ended

17. **IF CONNECTED WITH A PARTNER IN Q1 (Q1=F):** Please rate your experience with regard to coordinating with the Community Partner or Site Coordinator.

| | <i>Very Satisfied</i> | <i>Satisfied</i> | <i>Neither Satisfied nor Dissatisfied</i> | <i>Dissatisfied</i> | <i>Very Dissatisfied</i> | <i>Not Applicable</i> |
|--------------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------------|-------------------------------------------|---------------------|--------------------------|-----------------------|
| The Community Partner or Site Coordinator matched you with a volunteer position based on your skills and experience. | | | | | | |
| The Community Partner or Site Coordinator's expectations or guidelines regarding your role as a volunteer were clear. | | | | | | |
| The Community Partner or Site Coordinator provided the information needed for you to feel comfortable performing your assigned role. | | | | | | |

18. IF CONNECTED WITH A PARTNER IN Q1 (Q1=F): Did your experience connecting with a Community Partner or Site Coordinator prior to volunteering make you...

- a. Much more interested in volunteering
- b. More interested in volunteering
- c. As interested in volunteering
- d. Less interested in volunteering
- e. Much less interested in volunteering

19. IF CONNECTED WITH A PARTNER IN Q1 (Q1=F): How likely would you be to attend one or two short, informal meetings – either in-person or virtual – with your Site Coordinator prior to tax season if given the chance?

- a. Very likely
- b. Somewhat likely
- c. Neither likely nor unlikely
- d. Somewhat unlikely
- e. Very unlikely

20. IF CONNECTED WITH A PARTNER IN Q1 (Q1=F): How would you rate your overall experience coordinating with a Community Partner or Site Coordinator in advance of actually volunteering?

- a. Very Satisfied
- b. Satisfied
- c. Neither Satisfied nor Dissatisfied
- d. Dissatisfied
- e. Very Dissatisfied
- f. Not Applicable

21. IF CONNECTED WITH A PARTNER IN Q1 (Q1=F): What one thing should be improved during the coordination process between Community Partners/Site Coordinators and volunteers?

Text box for the open answer. Open-ended

Volunteer Experience

22. IF VOLUNTEERED IN Q1 (Q1=G): How satisfied were you with the Community Partner or Site Coordinator where you volunteered?

- a. Very Satisfied
- b. Satisfied
- c. Neither Satisfied nor Dissatisfied
- d. Dissatisfied
- e. Very Dissatisfied
- f. Not Applicable

23. IF VOLUNTEERED IN Q1 (Q1=G): When you volunteered, what category of taxpayers did you frequently serve? Select all that apply.

- a. Low-income taxpayers
- b. Elderly taxpayers
- c. Taxpayers with limited English
- d. Military/Veterans
- e. Students
- f. Taxpayers with disabilities

g. Other (specify) _____

24. IF VOLUNTEERED IN Q1 (Q1=G): Please rate your overall experience of volunteering.

| | <i>Very Satisfied</i> | <i>Satisfied</i> | <i>Neither Satisfied nor Dissatisfied</i> | <i>Dissatisfied</i> | <i>Very Dissatisfied</i> | <i>Not Applicable</i> |
|----------------------------------------------------------------------------------|-----------------------|------------------|-------------------------------------------|---------------------|--------------------------|-----------------------|
| The volunteer experience was a success. | | | | | | |
| I had the right training to make this a good experience. | | | | | | |
| I was prepared to help others. | | | | | | |
| I had the support I needed to handle situations where more expertise was needed. | | | | | | |
| The technology used at the site worked for me. | | | | | | |
| I made a difference for someone through this experience. | | | | | | |

25. IF VOLUNTEERED IN Q1 (Q1=G): How would you rate your overall experience serving as a volunteer?

- a. Very Satisfied
- b. Satisfied
- c. Neither Satisfied nor Dissatisfied
- d. Dissatisfied
- e. Very Dissatisfied
- f. Not Applicable

26. IF Q25=SATISFIED OR VERY SATISFIED: What one thing made you feel most satisfied with your overall volunteering experience?

Text box for the open answer. Open-ended

27. IF Q25=DISSATISFIED OR VERY DISSATISFIED: What one thing made you feel most dissatisfied with your overall volunteering experience?

Text box for the open answer. Open-ended

28. IF Q25=DISSATISFIED OR VERY DISSATISFIED: What could the Community Partner or Site Coordinator have done to improve your satisfaction?

Text box for the open answer. Open-ended

29. IF VOLUNTEERED IN Q1 (Q1=G): How valued did you feel by the Community Partner or Site Coordinator?

- a. Very Valued
- b. Valued
- c. Neither Valued nor Unvalued
- d. Unvalued
- e. Very Unvalued

30. IF VOLUNTEERED IN Q1 (Q1=G): How likely are you to recommend VITA/TCE volunteer opportunities to friends, co-workers, or family?

- a. Very Likely
- b. Likely
- c. Neither Likely nor Unlikely
- d. Unlikely
- e. Very Unlikely

31. IF VOLUNTEERED IN Q1 (Q1=G) AND WERE VERY LIKELY OR LIKELY IN Q30: Why would you invite a friend, co-worker, or family member?

Text box for the open answer. Open-ended

Communications

32. IF VOLUNTEERED IN Q1 (Q1=G): Please rate your experience with regard to communications and interactions with the Community Partner or Site Coordinator.

| | | | | | | |
|--|-------------|------------------|----------------|---------------------|-------------|------------|
| | <i>Very</i> | <i>Satisfied</i> | <i>Neither</i> | <i>Dissatisfied</i> | <i>Very</i> | <i>Not</i> |
|--|-------------|------------------|----------------|---------------------|-------------|------------|

| | <i>Satisfied</i> | | <i>Satisfied nor Dissatisfied</i> | | <i>Dissatisfied</i> | <i>Applicable</i> |
|-----------------------------------------------------------------------------------------|------------------|--|---------------------------------------|--|---------------------|-------------------|
| How well the Site Coordinator communicated everything I needed to know | | | | | | |
| The Site Coordinator's usage of technology I prefer for communications | | | | | | |
| The frequency with which the Site Coordinator communicated with me | | | | | | |
| The ability to get an answer from the Site Coordinator when I had a question or concern | | | | | | |
| My relationship with the Site Coordinator | | | | | | |

33. IF VOLUNTEERED IN Q1 (Q1=G): How would you rate the overall quality of communication with the Community Partner or Site Coordinator you volunteered with?

- a. Very Satisfied
- b. Satisfied
- c. Neither Satisfied nor Dissatisfied
- d. Dissatisfied
- e. Very Dissatisfied
- f. Not Applicable

Recognition and Retention

34. IF VOLUNTEERED IN Q1 (Q1=G): Please rate your experience with regard to the Community Partner or Site Coordinator valuing and rewarding the efforts of your volunteer experience.

| | <i>Very Satisfied</i> | <i>Satisfied</i> | <i>Neither Satisfied nor Dissatisfied</i> | <i>Dissatisfied</i> | <i>Very Dissatisfied</i> | <i>Not Applicable</i> |
|------------------------------------|---------------------------|------------------|---------------------------------------------------|---------------------|------------------------------|---------------------------|
| I was adequately recognized for my | | | | | | |

| | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|--|--|--|
| volunteer efforts. | | | | | | |
| I received thoughtful feedback on my volunteer efforts. | | | | | | |
| I was given statistics or other tangible information about how my efforts helped others, such as the number of tax returns prepared or the total amount of refunds my clients received. | | | | | | |

35. IF VOLUNTEERED IN Q1 (Q1=G): What aspects did you enjoy about volunteering? Select all that apply.

- a. Learned a new skill or improved a current skill
- b. Free education
- c. Networking
- d. The experience was personally meaningful
- e. Continuing education credits
- f. Tax preparation savings for you and your family
- g. Opportunities to socialize with others
- h. Other (specify) _____
- i. None of these [Removes any other selections]

36. IF VOLUNTEERED IN Q1 (Q1=G): Did you receive something useful for your volunteer efforts, such as an award or a small gift?

- a. Yes, and receiving something like that mattered to me
- b. Yes, though receiving something like that did not matter to me
- c. No

37. How important would each of the following be, if offered, in recognition of your volunteer efforts?

| | <i>Very Important</i> | <i>Important</i> | <i>Neither Important nor Unimportant</i> | <i>Unimportant</i> | <i>Very Unimportant</i> |
|------------------------------------------|-----------------------|------------------|------------------------------------------|--------------------|-------------------------|
| Weekly socials, dinners, or mixer events | | | | | |
| Certificate acknowledging my efforts | | | | | |

| | | | | | |
|----------------------------------------------------------------------------|--|--|--|--|--|
| A gala after tax-filing season | | | | | |
| Gift certificates | | | | | |
| Awards | | | | | |
| A tally showing how many returns you prepared | | | | | |
| A tally showing what dollar amount in refunds you identified for taxpayers | | | | | |

38.What else might be important to recognize your volunteer efforts?

Text box for the open answer. Open-ended

39.**IF VOLUNTEERED IN Q1 (Q1=G):** How would you rate your satisfaction with the overall level of recognition you received for your volunteer efforts?

- a. Very Satisfied
- b. Satisfied
- c. Neither Satisfied nor Dissatisfied
- d. Dissatisfied
- e. Very Dissatisfied
- f. Not Applicable

40.Were you aware the IRS has a recognition program for volunteers?

- a. Yes
- b. No
- c. I'm not sure

41.**IF VOLUNTEERED IN Q1 (Q1=G):** Did you receive a certificate from the IRS in recognition of your efforts?

- a. Yes
- b. No
- c. I'm not sure

42.**IF VOLUNTEERED IN Q1 (Q1=G):** What about the volunteer experience would keep you coming back to volunteer?

Text box for the open answer. Open-ended

43.How motivated are you to volunteer with the VITA/TCE program next year?

- a. Very Motivated
- b. Motivated
- c. Neither Motivated nor Unmotivated
- d. Unmotivated
- e. Very Unmotivated
- f. Not Applicable

44.Looking at every aspect of volunteering that you answered questions about in this survey so far, how would you rate your satisfaction with all that you experienced?

- a. Very Satisfied
- b. Satisfied
- c. Neither Satisfied nor Dissatisfied
- d. Dissatisfied
- e. Very Dissatisfied
- f. Not Applicable

Demographics

45.**IF VOLUNTEERED IN Q1 (Q1=G):** Did you volunteer with any of these programs? Select all programs for which you are at least fairly certain.

- a. The Volunteer Income Tax Assistance program, or VITA
- b. Tax Counseling for the Elderly, or TCE
- c. I may have volunteered for one of these but am not sure
- d. I did not volunteer with these programs
- e. Other (specify) _____

46.**IF VOLUNTEERED IN Q1 (Q1=G):** How many years have you volunteered with the free tax preparation assistance program?

Years: ____ [NUMERICAL Entry Box] ____

47.**IF VOLUNTEERED IN Q1 (Q1=G):** How often did you volunteer during the 2023 filing season?

- a. Less than once a week
- b. Once a week
- c. More than once a week
- d. Other (specify) _____

48. IF VOLUNTEERED IN Q1 (Q1=G): In which volunteer position(s) did you serve? Select all that apply.

- a. Greeter
- b. Screener
- c. Volunteer Tax Preparer
- d. E-file Transmitter
- e. Site Coordinator
- f. Marketing
- g. Other (specify) _____

49. Are you ...

- a. A former IRS employee
- b. A current IRS employee
- c. Neither of the above

50. Where do you currently reside? DROP DOWN OF ALL STATES, DC, Puerto Rico, Virgin Islands, Guam, Military Personnel Overseas.

51. How would you describe your gender?

- a. Male
- b. Female
- c. Another gender identity
- d. Prefer not to answer

52. What is your race and/or ethnicity? Select all that apply.

- a. American Indian or Alaskan Native
- b. Asian
- c. Black or African American

- d. Hispanic or Latino
- e. Middle Eastern or North African
- f. Native Hawaiian or Pacific Islander
- g. White

53. What is your age group?

- a. 20 years old or less
- b. 21-30 years old
- c. 31-40 years old
- d. 41-50 years old
- e. 51-60 years old
- f. 61 years old or more

54. Which of the following categories describes your household income?

- a. Less than \$25,000
- b. \$25,000 but less than \$35,000
- c. \$35,000 but less than \$50,000
- d. \$50,000 but less than \$75,000
- e. \$75,000 but less than \$100,000
- f. \$100,000 but less than \$150,000
- g. \$150,000 but less than \$200,000
- h. \$200,000 and above

Future Research

55. Occasionally, the IRS will conduct additional in-depth research, including focus groups or interviews, to improve taxpayer services. Data collected will be shared with IRS staff, but responses will be used for research and aggregate reporting purposes. Your identity will be protected as required by law. Let us know whether you are interested in participating in future IRS research.

- a. Yes
- b. No

Thank You.

Thank you for participating in the Volunteer Experience Survey. Your opinions matter to us and will be very helpful to the IRS to better serve volunteer needs and improve taxpayer services in the future.

Your response has been recorded. Please close your browser to exit the survey.

Exit survey.