2018-19 EKS CLIENT SURVEY DISTRIBUTION INSTRUCTIONS
(*PLEASE REVIEW WITH ALL OF YOUR VOLUNTEERS)*

The 2018-19 EKS Client Surveys in English and Spanish are finished and ready for you to hand out (and get back) from every tax client! It is a 2-page document that will be given out and started at check-in and can be completed while they are in the tax appointment. All clients will hand the survey back to the Intake Coordinator as they leave the site.

Surveys matter! Client feedback has been one of the *best* ways to implement our yearly EKS program improvement suggestions as well as to fundraise for our wonderful program as we continue to grow! ***Thank YOU for helping us do both!***

ACTION REQUIRED BY ALL TAX SITES: DISTRIBUTE, COLLECT BACK AND RETURN SURVEYS:

1) **Please print off both the English and Spanish Surveys** so you have a MASTER copy of both readily accessible at your site for Intake Coordinators to make copies with quickly as needed. Site Coordinators can also access these surveys on the EKS webpage under SC resources. Intake Coordinator can write in the dates**. Hint: Populate your site's name in the upper right-hand box *BEFORE* you make your site copies for the season.**

2) **Please train all Intake Coordinators, Tax Preparers and Interpreters how to work together to receive completed surveys back from EVERY client!** The Intake Coordinator will be sure to ask the client for the survey before they leave the site, and the tax preparers can help insure that they do by *NOT* putting the survey in the white envelope along with the tax return at the end of the appointment. (Surveys are anonymous unless they voluntarily leave their contact info on the back page, giving us "consent to contact" them at a later date to interview them if they received the federal or state Earned Income Tax Credit.) **Hint: Tax preparers can encourage this consent by making sure the client is *actually* aware they received one or both of the EITC's!)**

3) **A Client Survey must be present on every intake clipboard with the IRS 13614-C intake form**. Per VITA regulations, we are not allowed to have any individual partner organization's survey on the clipboard at tax time. We clearly make the client survey part of the overall intake paperwork to complete the tax appointment; that said, if a client is resistant to filling it out, that is ok. We just do NOT say "*it's optional"* when we give it to them at check in. **Hint: Intake Coordinators can let the client know that "*filling out this anonymous survey really helps us collect valuable program information to be able to open more free tax sites like this one."***

4) **Keep all surveys locked up with the other site materials throughout the season,** as some of them have personal client information on them.

5) **Mis-season and again at the end of the season, we will ask you to bring *or* send all Client Surveys you've collected to: UWWC, 975 Corporate Center Parkway, Ste. 160, Santa Rosa CA. 95407 ATTN: Kelsey Cupples.** Please keep them in two piles; those with contact info on them and those that are anonymous. Post season, volunteers will input all data into Survey Monkey to give us some *priceless client* feedback that we will share out with you as well!

Thank you all for helping us collect this Client Survey data!