



# Tax-Exempt Organization Burden Survey

For Sample Use Only

Your experience matters to us.

TEB

## This survey concerns your federal exempt organization return for Tax Year <<YEAR>>.

### Frequently Asked Questions

#### What is the Tax-Exempt Organization Burden survey?

This survey is about what it costs your organization to comply with tax rules and regulations as they relate to its federal exempt organization return. For most organizations, these costs are a combination of time spent and out-of-pocket expenses. Please be assured that you will not be asked about the income or other financial details of your organization's tax return.

#### Who should complete this survey?

The individual most responsible for maintaining the financial records for your organization or making the financial and tax-related decisions for your organization should complete this questionnaire. Please feel free to consult with others to complete the survey.

#### Should I send this survey to my external service provider or contractor?

No, please do not forward this survey to your external service provider, whether paid or volunteer, if you have one, because this survey concerns time and money spent by your organization, not theirs.

#### What does "federal exempt organization return" mean?

Federal exempt organization return in this survey refers to Form 990, 990-EZ, 990-PF, or 990-T, as well as any related forms (e.g., Form 8868), schedules, and worksheets.

#### How was my organization selected for this survey?

Your organization was randomly selected from organizations that have recently filed Form 990, 990-EZ, 990-PF, or 990-T returns.

If you provide services for more than one organization, please look at the address label of this mailing to see which organization was randomly selected to receive this survey.

#### How will my answers be used?

Please be assured that your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities.

#### Why should I participate?

While participation is voluntary, information about your organization's tax preparation experience will help the IRS reduce taxpayer burden. We encourage you to take a few minutes of your time to participate. By doing so, you will make sure that organizations like yours are represented.

#### How long will this survey take?

Public reporting burden for this collection of information is estimated to average 10 to 15 minutes, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.

#### Who can I contact with questions?

If you have questions about the content of this survey please call Dawn Nelson at Westat by phone at 855-810-5212 or send an email to IRS-TEB@westat.com. If you would like to contact someone at the IRS, please email Scott Leary at Scott.P.Leary@irs.gov. To read the official IRS announcement regarding this survey, please visit the following URL on the IRS website: <https://www.irs.gov/statistics/teb-survey>.

## Web Survey Instructions

If you would prefer to complete the survey on the web, you may do so by following the instructions below. Web responses are processed more quickly and will help ensure that you don't receive follow-up contacts.

### 1. Go to the website.

To take the secure online survey, please go to:

[www.IRS-TEBSurvey.org](http://www.IRS-TEBSurvey.org)

### 2. Log in.

You will need the following PIN to access the survey:

**PIN: [PIN]**

### Problems?

If you have any technical difficulties, including problems with the website, please call 855-810-5212 or send an email to IRS-TEB@westat.com.



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**Instructions:**

Please use a black or blue pen to complete this form.

Mark  to indicate your answer.

If you want to change your answer, darken the box  and mark the correct answer.

**Tax Preparation Methods and Activities**

**This survey concerns your federal exempt organization return for Tax Year <<YEAR>>.**

For this survey, "federal exempt organization return" refers to Form 990, 990-EZ, 990-PF, or 990-T, as well as any related forms (e.g., Form 8868), schedules, and worksheets.

1. Which of the following methods did your organization use to prepare its most recent federal exempt organization return? Include activities done by organization officers, employees, and external service providers.

Did your organization use...

Mark all that apply.

- a. An outside tax professional? (e.g., a CPA, accountant, bookkeeper, a tax lawyer, an enrolled agent, registered tax preparer)
- b. A tax advisory/planning service?
- c. Accounting and/or financial software? (e.g., QuickBooks Pro™, Sage®)
- d. Tax preparation software? (e.g., TurboTax®, CCH®, ONESOURCE™, Aplos.com, custom software)
- e. Any other method(s)? *Please describe:*

Blank text box for describing other methods.

**Tax-Related Recordkeeping**

Think about your organization's recordkeeping activities, specifically tax-related recordkeeping. Tax-related recordkeeping includes all the activities your organization did to create, maintain, and store records needed to complete its federal, state, and local tax returns. In this section, we are going to discuss the records you maintain for federal exempt organization purposes.

2. Which of the following statements describe the accounting or bookkeeping system your organization used? Did your organization...

Source	Yes	No	Don't know
A. Use an off-the-shelf accounting and financial software system such as QuickBooks Pro™, Sage®, Quicken®?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Use spreadsheets or general recordkeeping software products such as Microsoft® Office, IBM Notes®, OpenOffice?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Maintain a hard-copy ledger to record organization transactions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Use any other accounting or bookkeeping system? <i>Please describe:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Blank text box for describing other accounting or bookkeeping systems.



### Time Spent on Activities Related to the Federal Exempt Organization Return

This survey concerns your federal exempt organization return for Tax Year <<YEAR>>.

3. As mentioned in the FAQs, the purpose of this survey is to measure what it costs tax-exempt organizations to comply with rules and regulations related to the federal exempt organization return. For most organizations, these costs are a combination of time spent and out-of-pocket expenses (e.g., fees paid to external service providers, software costs).

The next question asks about the time spent on activities related to filing your organization's federal exempt organization return.

Think about all the time your organization spent on tax-related recordkeeping, tax planning, gathering tax-related materials, learning about tax law, using IRS or non-IRS resources, completing, reviewing, and submitting your federal exempt organization return, and calculating and depositing estimated tax payments.

**Please include time spent:**

- On your federal exempt organization return as well as any associated forms, schedules, and worksheets that you completed or filed
- Throughout the tax year as well as the tax filing season
- Corresponding with your external service provider(s)

**Please do NOT include time spent:**

- By your external service provider(s) including pro bono services
- On state or local tax returns
- On employment tax returns and payroll activities
- On foreign tax returns
- On information returns, such as W-2s or Form 1098-C
- On retirement and pension-related activities

Please feel free to consult with others to complete these questions. If you do not know the exact amount, please provide your best estimate.

**3A. How much time did your organization spend on the following activities?**

This time is for in-house staff only, not any external service providers.

1. Tax recordkeeping, including reconciling financial and tax records

							:		
Hours							Minutes		

No time spent

2. Tax planning

							:		
Hours							Minutes		

No time spent



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This survey concerns your federal exempt organization return for Tax Year <<YEAR>>.

3A. How much time did your organization spend on the following activities?

This time is for in-house staff only, not any external service providers.

3. Gathering materials, learning about tax law, and using IRS or non-IRS resources

Hours: Minutes

No time spent

4. Calculating and depositing estimated income tax payments

Hours: Minutes

No time spent

5. Completing and submitting your federal exempt organization return

Hours: Minutes

No time spent

6. Other tax-related activities, please describe:

Text input box for describing activities

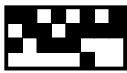
Hours: Minutes

No time spent

4. What is the average hourly pay rate for all individuals in your organization who are responsible for activities related to the federal exempt organization return?

If you don't know the average hourly pay rates for these individuals please provide your best estimate.

Dollars and Cents input fields



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### Costs Associated with Tax Compliance

This survey concerns your federal exempt organization return for Tax Year <<YEAR>>.

5. Think about how much money your organization spent to comply with reporting obligations related to its federal exempt organization return. Costs associated with tax compliance are a very important part of assessing burden, so please provide your best estimate.

5A. How much did your organization pay an external service provider for federal exempt organization return planning?

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Dollars

Cents

No money spent

5B. How much did your organization pay an external service provider for federal exempt organization return preparation?

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Dollars

Cents

No money spent

6. How much money, if any, did your organization spend on tax-specific software?

Include any costs your organization may have incurred for annual maintenance and updates.

Total money spent on all tax-specific software (e.g., TurboTax®, CCH®, ONESOURCE™, Aplos.com, custom software)

\$ 

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Dollars

Cents

No money spent

7. If applicable, how much money did your organization spend on tax-related activities not included in questions 5A, 5B and 6 for your organization's federal exempt organization return? This may include money spent on electronic submission, photocopies, tax research services, tax publications and journals, transportation, postage, or IRS user fees.

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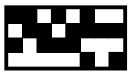
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Dollars

Cents

No money spent

Do NOT include money your organization spent on external service provider(s), tax software, or employee compensation.



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### Additional Questions

**This survey concerns your federal exempt organization return for Tax Year <<YEAR>>.**

8. How many state exempt organization returns did your organization file? If you do not know how many state exempt organization returns your organization filed, please provide your best estimate.

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Number of returns

9. Please describe below any suggestions you have for how the IRS could improve taxpayer service or reduce the compliance burden associated with Forms 990, 990-EZ, 990-PF, 990-T, 8868, or related forms, schedules, worksheets, and instructions.

10. Considering all aspects of tax-exempt activities, what do tax-exempt organizations find to be the most difficult part of complying with IRS's reporting regulations?

Thank you for completing our survey.

## Privacy and Paperwork Reduction Act Notice for Tax-Exempt Organization Burden Data Collection

The Privacy Act of 1974 states that when we ask you for information, we must first tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if you do not provide it and whether or not you must respond under the law.

Our legal right to ask for this information is 5 U.S.C. 301.

The primary purpose for requesting the information is to analyze the role of taxpayer burden in tax administration. We will also use the information to fulfill the IRS' statutory obligations to the Office of Management and Budget and Congress for information required by the Paperwork Reduction Act, and to provide tax policy analysis support to the Office of Tax Analysis at the Department of the Treasury. We will also use the information provided to better understand taxpayer needs and burden reduction opportunities.

Tax information may be disclosed only as provided by 26 U.S.C. 6103. Providing the information is voluntary. Not providing all or part of the information requested may reduce our ability to address taxpayer concerns regarding paperwork reduction.

OMB No: 1545-2212. This report is authorized under the Paperwork Reduction Act. Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will be protected to the fullest extent allowable under the Freedom of Information Act (FOIA). Public reporting burden for this collection of information is estimated to average 10 to 15 minutes, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Ave. NW, Washington, DC 20224.