

**OMB SUPPORTING STATEMENT
FOR THE STUDY TO MEASURE CUSTOMER SATISFACTION OF
IRS Wage & Investment UNDERSTANDING TAXES ONLINE PROGRAM
February 2007 – December 2007**

Introduction

Background

IRS has replaced its traditional measures of accomplishment with a balanced measurement system consisting of business results, customer satisfaction, and employee satisfaction. The Program and Product Development (P&PD) section within the Stakeholder Partnership, Education and Communications (SPEC) office of Wage & Investment (W&I) will be responsible for providing an online program for students to learn about the history, theory and application of taxes in the United States. As an important customer interface for W&I, P&PD will need feedback from customers to continuously improve its operations. This initiative is part of the Service-wide effort to establish a system of balanced organizational performance measures mandated by the IRS Restructuring and Reform Act of 1998. This is also a result of Executive Order 12862, which requires all government agencies to survey their customers and incorporate customer preferences in their process improvement efforts.

The key goals of the survey are to track customer satisfaction with and usability of the online Understanding Taxes Program and to identify necessary improvements.

Objectives of Data Collection

The customer satisfaction survey questionnaire is attached. Completion of the survey is expected to take approximately three minutes and forty-five seconds.

The objective of the survey will be to gauge customer expectations and perceptions about the online Understanding Taxes Program. The questionnaire is based on the vendor's Unisys, Shaw Web Technology methodology, which asks respondents to evaluate various aspects of their experience and to provide an overall summary evaluation. The results should facilitate more effective management of W&I UT by:

- Providing insight from the customer's perspective about possible improvements.
- Providing useful input for program evaluation of the usefulness of the program

The survey will include several rating questions evaluating usefulness of the UT Program to students and teachers. In addition, ample space will be provided for suggestions for improvement.

Survey scoring for this contract will be based on the Customer Satisfaction Survey Score response average to the keystone question – "How would you rate your overall experience with the use of the UT Program?" Questions will utilize a 5-point rating scale, with 1 being very dissatisfied and 5 being very satisfied. All survey responses generated will be confidential. The vendor shall ensure that taxpayers responding to the survey are guaranteed anonymity.

Methodology

The sample universe will consist of teachers and students who complete the on-line Understanding Taxes Program beginning in February 2007, and continue through mid-December 2007. The UT web site will be updated in mid-December 2007 and the survey would begin again when the site is updated and continue through mid-December 2008, and so on each year.

UT users will access the survey from the teacher and student lesson pages. A teaser will appear to prompt the user to take the survey.

The teaser below will appear on the following teacher/student lesson pages:

- How's of Taxes both Student and Teacher pages at the bottom of page (13 modules)
- How's of Taxes Spanish Student pages (13 modules)
- Why's of Taxes all themes, the last lesson for each theme (6 themes)
- At the bottom of the page Tools, Using this site

Tell us what you think! If you have completed two or more lessons, please return to the [Student Home page](#) and [Teacher Home page](#) to give us your thoughts and opinions on Understanding Taxes.

[Link will take user directly to the **Tell us what you think!** area of the Student and Teacher Home page. See below.]

Tell us what you think! Please take a few minutes to complete a very short *Understanding Taxes* user [survey](#). Your thoughts and opinions will help us continue to meet the needs of educators and students.

The vendor will summarize the ratings and produce a national report showing customer satisfaction scores on all UT survey items and overall improvement priorities for the program.

Expected Response Rate

Every attempt has been made in designing this survey to maximize response rate. We do anticipate a low response rate (2%) since this is an on-line survey and the user of the UT web site will see the survey only if they choose to click on the link to the survey. With regard to the low response rate, the IRS will assume that all data collected from this survey is qualitative in nature, and that no critical decisions will be made by SOI solely from the analysis of data from this survey. The results from this survey are simply one piece of a larger set of information needed to assess taxpayer needs related to services provided by the IRS.

Cost of Study

The estimate cost to update the evaluation and prepare reports is \$11,800.

Statistical Contact

For questions regarding the study or questionnaire design, contact:

Kathy Woody
Shaw Web Technology
444 West Beech St, 4th Floor
San Diego, CA 92101

Privacy, Security, Disclosure and Confidentiality

The IRS will ensure compliance with Taxpayer Bill of Rights II. All participants will be treated fairly and appropriately. The IRS will apply and meet fair information and record-keeping practices to ensure privacy protection of all participants. This includes criterion for disclosure—laid out in the Privacy Act of 1974, the Freedom of Information Act, and Section 6103 of the Internal Revenue Code—all of which provide for the protection of taxpayer information as well as its release to authorized recipients. Confidentiality will be safeguarded.

The security of the data used in this project and the privacy of participants will be carefully safeguarded at all times. Security requirements are based on the Computer Security Act of 1987 and Office of Management and Budget Circular A-130, Appendices A7B.

When the user accesses the survey from the teacher or student lesson pages, they will receive the message that they will leave the IRS web site and enter a privately owned web site created, operated and maintained by a private business. The survey will be hosted on our Contractor, Unisys, Shaw Web Technology's server. Because the user is entering the vendor's server through irs.gov, the Contractor will not have any identifiers from the user.

No personal identifiers will be collected as part of the survey. The Contractor's staff will review all open-ended responses and remove any volunteered identifiers before delivery of the data to the IRS.

The OMB Control #1545-1432, burden statement and contact information will appear on the opening screen of the Internet questionnaire.

PRA Statement & OMB Control Number on Collection Instruments

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 survey is 1545-1432. If you have any comments regarding this survey, please write to:

IRS, Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
1111 Constitution Avenue, NW
Washington, DC 20224

Burden Hours

The UT survey has been designed to minimize burden on the taxpayer. The time that a respondent takes to complete the survey has been carefully considered and only the most important areas are being surveyed. The average time of survey completion is expected to be 3 minutes and 45 seconds. This is based on the revised questionnaire consisting of 6 satisfaction questions; 4 closed-ended questions for the teachers about the number of students taught, grade level, and subject areas; 4 yes/no questions asking about use of the links, effectiveness as a teaching tool, recommendation to others and use in future years; a categorical question asking about the user (whether teacher or student); and 2 open-ended question on suggestions for improvements. The questions are generally one sentence in structure and on an elementary concept level.

Based on a sample of potential respondents of 200,000 and a response rate of 2%, we expect 4,000 survey participants leaving 196,000 non-participants. The contact time to determine non-participation could be up 30 seconds, with the resulting burden for non-participants being $196,000 \times .50 = 98,000$ minutes/60 minutes = 1633.33 burden hours. For participants, the time to complete the survey is 3 minutes and 45 seconds. The total burden for this group being $4,000 \times 3$ minutes 45 seconds (3.75 minutes) = 15,000 total minutes / 60 minutes = 250 burden hours. Thus the total burden hours for the study would be $(1633.33+250)$ 1883.33 hours.