

**IRS C&L NATIONWIDE TAX FORUM RECRUITING EMAIL**

FROM: Candice Cromling  
Director, National Public Liaison

SUBJECT: IRS Tax Forum Focus Group

Dear Tax Professional:

I am requesting your assistance on an important research dealing with improving the quality of the IRS tax forums. The purpose of the research is to obtain information to help improve the tax forums. While the IRS conducts online customer surveys, this effort is to gather more in-depth information in a qualitative manner. You are being invited to participate because our records indicated that you attended a tax forum in 2006.

The research entails participation in a one-hour telephone discussion with a few other tax forum participants during the week of June 5. In exchange for your time, we are offering an honorarium of \$50 for each participant. If you are interested, please reply with your availability to each of the following time slots.

- June 5, 1PM Eastern
- June 5, 3PM Eastern
- June 6, 1PM Eastern

As we need to balance the groups demographically, our contract vendor Pacific Consulting Group in conjunction with Training Technologies, Inc. will contact you, if you are selected to participate. Dial-in information will be provided to you at that time.

A professional moderator from Pacific Consulting Group will be facilitating the discussion. Ordinarily, we audiotape the session to save time writing and listening at the same time and we keep your individual responses confidential, only reporting findings in summary form. If you would like to verify the authenticity of the survey request, you may contact Linda McBurney, Office of Communications & Liaison, by phone (706) 650-3295 or by email at [Linda.g.mcburney@irs.gov](mailto:Linda.g.mcburney@irs.gov).

**IRS C&L NATIONWIDE TAX FORUM FOCUS GROUP CONFIRMATION EMAIL**

FROM: Pacific Consulting Group, on behalf of the IRS

SUBJECT: IRS Tax Forum Focus Group Confirmation

Dear XXXX,

Thank you very much for your interest in participating in a focus group regarding the IRS Nationwide Tax Forum. This is to confirm that the phone focus group you will be attending is at the following date and time:

[INSERT DATE AND TIME]

Please call [INSERT PHONE NUMBER AND PASSCODE] to access the focus group.

We are offering an honorarium of \$50 for you as a token of our appreciation for your time. Please reply to this email with your mailing address so we can mail you a check after the focus group is completed. If your schedule has changed and you can no longer participate in this focus group, or you would like to switch to another focus group, please let us know by email as soon as possible.

Sincerely,

Pacific Consulting Group

**IRS C&L NATIONWIDE TAX FORUM FOCUS GROUP REMINDER EMAIL**

FROM: Pacific Consulting Group, on behalf of the IRS

SUBJECT: IRS Tax Forum Focus Group Reminder

Dear XXXX,

This is a friendly reminder that the phone focus group you have agreed to attend is at the following date and time:

[INSERT DATE AND TIME]

Please call [INSERT PHONE NUMBER AND PASSCODE] to access the focus group.

We are offering an honorarium of \$50 for you as a token of our appreciation for your time. If you haven't emailed us your mailing address, please do so by replying to this message so we can mail you a check after the focus group is complete. We look forward to your participation and hearing your input.

Sincerely,

Pacific Consulting Group

**C&L NATIONWIDE TAX FORUM  
FOCUS GROUP DISCUSSION GUIDE**

*(Notes to the moderator are in italics)*

**Overview**

Hello, I'm **(NAME)** from Pacific Consulting Group. I will be moderating our discussion today. The topic we'll be discussing is your experience with the IRS' Tax Forums.

I would like to thank all of you for calling in. Our discussion will take about one hour. We would like to know your real attitudes and feelings, so please be as open with us as you can. I am part of an independent company who has been hired by the IRS to objectively evaluate the service, so please feel free to be as candid as possible. We are recording this session so I don't have to take notes while you talk. We also have some people listening in. We will not be reporting individual identities; our focus here is on your experiences and opinions. You will need a piece of paper and a pencil or pen.

We are going to focus specifically on your experience with the Tax Forum Team's services. The overall goal of the research is to develop a questionnaire that can be used to gather feedback from a much wider audience of users. In order to create a questionnaire, we need to get information from you on how you evaluate your experience attending IRS tax forums.

**Introductions**

Before we get started, let's go around and quickly introduce ourselves and please tell me your job function and tax forum you most recently attended, or if you only use them periodically. Let's start with **(NAME)**.

- Respondent
- Organization/firm
- Tax forum most recently attended

In general, how has your experience with the Nationwide Tax Forums.

Tell me about some particularly good experiences or obstacles you have encountered with the nationwide tax forums you've attended.

***Pursue general conversation as much as possible to identify which areas are most important to this population.***

**Service Satisfaction Criteria**

I'd like to talk about your overall experience with the IRS' Tax Forums. I'd like each of you to think in broad terms at first, and then we'll get to the more specific ways in which you judge the service you received. What we are trying to do here is develop a "report card" for the service provided.

Okay, let's start by having each of you write down 4 or 5 areas which you feel determine whether you are satisfied or dissatisfied with the IRS tax forums. For example, if I asked you to rate service in a restaurant, you might think about several things: the food itself, the way it was served, the physical environment, and what you pay. It's not just one aspect of service that's important, but a combination of several. After we identify some broad categories, then we'll go back and discuss each one in more detail.

Are there any questions?

*Allow a few minutes of silence for respondents to think about this, then ask each one to share his/her list with the group. Note each category to be probed in the next part of the discussion.*

Probing (Prompt with these areas to generate discussion if needed)

- o *Professionalism/courtesy of the Nationwide Tax Forum representatives*
- o *Information received about forums*
- o *Forum materials*
- o *Seminar topics*
- o *Forum logistics (location, length of time)*
- o *Presenters*
- o *Networking opportunities*
- o *Other method of conducting the forums (e.g. webcasting, podcasting) other than the general face-to-face meeting format*

*Add any additional categories mentioned by respondents to this list and probe those as well.*

***As conversation winds down, select which larger categories are relevant to this group and will be discussed.***

Now, let's take each of the broad categories that you've identified and find out what criteria you would use to decide just how good or bad the service is for that category. Let's return to the idea of a "report card". If the subject is elementary language skills, the evaluation criteria might be reading, writing, spelling, and so forth. If we are evaluating the restaurant and the larger category is food, some of the more detailed things we would consider might be the quality of the food, the quantity of food, how well it was cooked and seasoned, etc.

Let's start with (FIRST CATEGORY). What do you expect from (FIRST CATEGORY)  
*Probe each topic you select for specifics that determine satisfaction.*

Which of the above items are most important to you?

Let's talk about specific examples of excellent service you received, and examples that fell short of expectations. *Probe for specific examples.*

**Similar Organizations**

- Have any of you attended other forums/conferences about tax information?
- Compared to other forums you've attended, how would you rate the IRS Nationwide Tax Forums?
  - Better, same, worse

**Wrap-up**

Do you have any additional advice for the IRS on how the tax forums could be improved?

Those are all the questions that I have. On behalf of both PCG and the IRS, thank you for your time and participation today.

**Paperwork Reduction Act Notice**

The Paperwork Reduction Act requires IRS to display an OMB Control Number on all approved information requests. About 10 minutes will be needed to complete this voluntary questionnaire. If you have comments about the time estimate, or suggestions for simplifying the form, please write to the Tax Products Coordinating Committee, 1111 Constitution Ave. NW, Washington, DC 20224.

OMB Control Number 1545-1432