**IRS Communications & Liaison**
**National Public Liaison's Nationwide Tax Forums**
**Customer Satisfaction Survey 2007**

## ***Background***

The mission of the Office of Communications & Liaison (C&L) is to enable the Internal Revenue Service (IRS) to achieve its strategic business objectives by integrating communications across the agency, and managing interactions and information sharing with key internal and external stakeholders. Our efforts produce widespread public acceptance and understanding within the Congress, the news media, practitioner groups and the state and local community.

Our involvement also enables IRS business units to obtain faster, pre-decisional engagement of stakeholders to make more informed and better operational decisions that affect taxpayers. C&L is instrumental in achieving employee understanding of IRS priorities – thus shoring up employee support and commitment to the Agency's mission. In addition to initiative-specific work that supports IRS business units, C&L actively pursues performance improvements within our own operations – driving for efficiency and cost-effective business processes.

The Nationwide Tax Forums provide the mechanism through which information exchange occurs between outside stakeholders including industry experts and IRS Executives. It is a link to the public's perception of the Commissioner's strategic initiatives; ultimately resulting in recommendations that improve tax administration. This past year, the Tax Forums' accomplishments included, but were not limited to: (i) Providing tax related educational seminars to over 17,500 tax professional; (ii) communicating the IRS' strategic plan for 2005-2009; and (iii) providing IRS leadership with feedback from these practitioners so that programs and initiatives can revised to create less burden on the public.

The Tax Forums create a platform for conducting focus groups, offering CPE credits to our practitioners, furthering the public's use of electronic means to interact with the IRS, and establishing a positive relationship with the tax practitioner community.

## ***Objectives***

The objectives of this survey are to:

- Gauge overall customer satisfaction with the program.
- Determine what our customers' value.
- Assess the need for change in program administration.
- Identify areas needing improvement to strengthen the program.
- Ensure customer input is included in strategic program planning.

## ***Methodology***

A set of three one-hour focus groups will be conducted by telephone with prior Tax Forum attendees to help revise the questionnaire instrument for the broader survey by eliciting key satisfaction drivers. An invitation to participate in the focus group will be distributed electronically. A total of 27 people will be recruited for the three focus groups. A confirmation email will be sent to the first 27 affirmative responses. The discussion guide and the invite email message is included as Attachment A.

The survey, including an invitation to participate in it, will be distributed electronically 7-14 days after each Tax Forum to the attendees. The email will include a unique login name and a password for each respondent for the survey. Attachment B is a copy of the questionnaire. The questionnaire will be modified slightly to include focus group feedback. Any adjustments should not alter the burden estimates of the survey; rather, we expect changes to reflect wording that best matches customer perceptions of service. When the survey is completed, the respondents will receive the message:

> "Thank you for completing this survey. The results will be used to help identify areas of service that need improvement in the IRS Nationwide Tax Forum."

The results of the survey will be tabulated, analyzed and incorporated into program administration.

*Schedule for Focus Groups and Surveys*

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| Focus Groups | June 5-6, 2007 | |
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| 2007 Surveys | **Tax Forum:** | **Survey Conducted after each Tax Forum** |
| | ▪ July 17-19 Atlanta, GA | ▪ Aug 7-28 |
| | ▪ July 31-Aug 2 Chicago, IL | ▪ Aug 21 – Sept 11 |
| | ▪ Aug 21 – 23 Las Vegas, NV | ▪ Sept 11 – Oct 2 |
| | ▪ Aug 28 – 30 New York, NY | ▪ Sept 18 – Oct 9 |
| | ▪ Sept 11- 13 Anaheim, CA | ▪ Oct 2 – 23 |
| | ▪ Sept 18 - 20 Orlando, FL | ▪ Oct 9 – 30 |

The detailed schedule for sending the surveys, the data collection period and the due date for the Analysis Report are shown in Attachment C.

*Methods to Maximize Response Rate*

After the initial email is sent to the Tax Forum attendees inviting them to participate in the survey, up to two follow-up emails will be sent to those who have not completed the survey urging them to respond. Each follow-up email will include the respondent's unique URL, login name and password. Attachment D is a sample of the email invitation and reminders.

Last year, 53% responded and we expect the same response rate for this year's survey.

*Survey Design*

C&L engaged the vendor, Pacific Consulting Group (PCG), to conduct focus groups and to develop the survey instrument. Neither the focus groups nor survey questions ask for any taxpayer information but address the Tax Forum events, presenters, booths, etc., and integrates the feedback received from the attendees.

*Data Analysis*

The focus group information will be obtained by PCG to refine the survey instrument. A brief summary of the focus groups will be provided to C&L. All customer satisfaction survey responses will be sent directly from the respondents to PCG for processing. After all of the Tax

Forums data collection periods have ended, the quantitative customer satisfaction ratings will be summarized and a report will be produced for the Nationwide Tax Forums.

*Efforts to Not Duplicate Research*

C&L's Office of National Public Liaison has the sole responsibility for coordinating the Nationwide Tax Forums and the customer survey feedback which is one of their balanced measures. The one survey instrument is used for all of the Tax Forums conducted that fiscal year. It would be revised for future Tax Forums based on the previous year's feedback and any new items integrated in the Tax Forums for that year.

***Participants Criteria***

The criteria for the focus groups are attendees who participated in Tax Forums in 2006. The criterion for the survey is that the participants are registered attendees at the Tax Forums and that they have agreed to receive the survey through email.

*Privacy, Security, Disclosure, Confidentiality*

The Nationwide Tax Forum survey involves no taxpayer Information and the survey will be sent to only those attendees who agreed to be contacted. We will provide only first name, last name and email addresses of those Tax Forum attendees to the vendor. All survey responses will be sent directly to the vendor.

PCG will maintain the contact information and data collection method, such as databases, on servers that have been reviewed and certified by the IRS Computer Safeguards program. The annual safeguarding reports are available from the either the IRS Contracting Officer, Mike Grado, or the Contracting Officer's Technical Representative, Pamela Seibert.

***Cost***

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| Focus Groups: | $ 7,839 |
| Surveys: | $37,106 |
| Total: | $ 44,945 |

*Honorarium*

Each participant in the Focus Groups will be paid an honorarium of $50. The participants are tax professionals and their participation in the focus groups will be during typical business hours, which means that they will be taking time away from when they would be available for their clients. The $50 is an incentive for some compensation that they might lose otherwise. The amount is inline with and somewhat lower than what is typically offered to business professionals.

***Burden Hours***

Estimated Total Burden for Focus Groups and Surveys: 29,115 minutes or 484.5 hours

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| Focus Groups | ▪ Recruit by sending 540 email invitations x .5 minute = 270 minutes/60 = 4.5 hours<br>▪ The first 27 people that respond affirmatively will participate in the focus groups. 5% Participation rate: 27 people x 5 minutes/person = 135 minutes/60 = 2 hours<br>▪ Focus Group session: 27 people x 1 hour (60 minutes)/person = 27 hours (1,620 minutes) |

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| | Estimated Focus Group Total Burden = 2,025 minutes or 33.5 hours |
| Surveys | ▪ Recruit by sending 4,300 email invitations x 1 minute = 4,300 minutes/60 = 72 hours<br>▪ Based on a historical response rate of 53% x 4300 = 2,279 x 10 minutes to complete questionnaire = 22,790 minutes/60 = 379 hours<br><br>Estimated Surveys Total Burden = 27,090 minutes or 451 hours |

***Attachments***

Attachment A: Focus Group Invitation Email and Discussion Guide
Attachment B: Tax Forum Questionnaire
Attachment C: Schedule of Nationwide Tax Forums Customer Surveys
Attachment D: Survey Invitation and Reminder Emails to Attendees