

**OMB STATEMENT FOR THE
PRACTITIONER PRIORITY SERVICE SURVEY – CY08
FOR THE WAGE & INVESTMENT DIVISION
BPA TIRNO-05-Z-00014
January 2008 - Ongoing**

Introduction

Practitioner Priority Service (PPS) is a nationwide toll-free accounts-related service for all tax practitioners. It is the practitioners' first point of contact for clients with account-related questions. This service replaces the former Practitioner Hotline (PHL). The toll-free Practitioner Priority Service consolidates the former forty-six sites into five (5) campus sites. In preparing for the transition from Practitioner Hotline to the toll-free Practitioner Priority Service, opinions and concerns were sought from the tax practitioner community. Tax practitioners across the nation consistently expressed a concern over the potential loss of specialized service. They continually informed IRS of the value they placed on the personal, friendly, and understanding service the Practitioner Hotline provided. This new service is expected to improve the overall consistency and quality of that service. It is also expected to improve accessibility into the system and reduce wait times. All employees answering these calls will receive specialized training to handle these calls. Their training will include relationship training designed to provide representatives with an in-depth knowledge of the specialized treatment and priority needs of the tax practitioners.

Customer Satisfaction Survey

This survey is being instituted to serve several purposes. The mean overall satisfaction response reported will form the Practitioner Customer Satisfaction Measurement for Customer Accounts Services (CAS) Accounts Management. Secondly, the survey will permit CAS Accounts Management to assess customer satisfaction by providing quantitative data about the tax practitioners' perception of knowledgeable and personal resolution of issues. Finally, survey results may be used to improve the program and enhance the skills and relationship training given to the employees.

The contractor shall continue with current year administration procedures and questionnaire. A few questions were added to the survey in 2006 in order to obtain demographic and preference information.

Survey scoring for this contract is based on the Customer Satisfaction Survey Score response average to the keystone question – "Overall, with everything considered, please rate your overall satisfaction with the service you received during this call?" Questions utilize a 5-point rating scale, with 1 being very dissatisfied and 5 being very satisfied. All survey responses generated are kept confidential. The vendor ensures that customers responding to the survey are guaranteed anonymity.

The PPS Customer Satisfaction Survey has already been developed and is currently in use. The survey is conducted via an automated computer system. Completion of the survey takes approximately fifteen minutes. It contains a standard set of questions, but allows flexibility to vary questions as needed. To maintain the ability to compare results

from quarter to quarter, changes that impact the meaning of questions will occur minimally.

Design and Methodology

The survey shall be conducted as an automated survey administered to Tax professionals who call PPS line. At the conclusion of the PPS call, callers will be randomly selected and ask to participate. Willing participants will be asked a few questions and then transferred into the survey. We anticipate a 60% response rate. Standard procedures will be used in order to obtain the highest response rate possible.

The contractor will document the sampling plan, including the target population and sampling frame, sampling specifications, expected reliability of the sample estimates, sampling limitations, preliminary sampling weights, and the strategy for achieving target quotas within key strata.

To allow for quarterly validity at the site and national levels, the following sample size (stratified by 5 W&I sites) has been determined:

- 200 completes per site per quarter
- 1000 completes nationally per quarter
- 800 completes per site annually
- 4000 completes nationally annually

The contractor shall monitor the sampling process to ensure the procedures are providing the desired numbers of practitioner respondents and will coordinate with appropriate W&I personnel on sampling and related matters.

Disclosure, Security & Confidentiality

Confidentiality will be safeguarded. The data collection process, participants will be identified to IRS personnel by their first names only. In addition, no participant's names will be mentioned in the focus group report. Participants will be advised that observers from the IRS may be behind the one-way mirror and that their comments will be audio and videotapes.

The survey will not contain tax return or taxpayer information. Survey participants will not be identified in any of the documents or files used for this project. We will limit and control the amount of information we collect to those items that are necessary to accomplish the research questions. We will carefully safeguard the security of data utilized as well as the privacy of the survey respondents. We will apply the fair information and record-keeping practices to ensure protection of all survey respondents. The criterion for disclosure laid out in the Privacy Act, the Freedom of Information Act, and section 6103 of the Internal Revenue Code provides for the protection of information as well as its releases to authorized recipients.

We will apply fair information and record-keeping practices to ensure protection of all taxpayers. The criterion for disclosure laid out in the Privacy Act, the Freedom of Information Act, and section 6103 of the Internal Revenue Code, provides for the protection of taxpayer information as well as its release to authorized recipients

Evaluation

The contractor shall, on a quarterly basis, summarize the quantitative ratings and produce an overall national report showing customer satisfaction scores on all Practitioner Priority Service survey items and overall improvement priorities for the function. This report will show overall results and results stratified by sites.

On a quarterly basis, the contractor will prepare site reports containing individual site scores on each survey item and improvement priorities for the individual sites, including:

- Improvement Priorities for PPS line
- Survey Response Rates
- Call Composition by PPS site
- Customer Characteristics for Tax Professionals
- Differences in Call Mix over Time
- Average Satisfaction Rating for each Question
- Average Customer Satisfaction Ratings over Time
- Improvement Priorities by Customer Groups
- Top Priority Improvement Areas for PPS

The contractor will include any relevant database variables in the analysis and will weight the survey responses as necessary to reflect accurately the entire customer base. The contractor and IRS will agree on the exact specifications and contents of the report.

Estimate of the Burden of Data Collection

The survey interview has been designed to minimize burden on the taxpayer. The time that a respondent takes to complete the phone survey has been carefully considered and only the most important areas are being surveyed. The average time of survey completion is expected to be 8 minutes. The questions are generally one sentence in structure and on an elementary concept level.

We have made every attempt in designing this survey to maximize response rate. Using the response rate of 60%, the total estimated annual burden in hours is estimated to be 555 hours, broken down as follows:

Respondents: $4,000 \times 8 \text{ minutes}/60 = 533 \text{ hours}$

Non-respondents: $2,667 \text{ surveys} \times 30 \text{ seconds}/60 = 22 \text{ hours}$

The grand total is estimated to be 555 hours.

Other Information

The following information will be provided to Human Capital Office within 60 days after the close of the survey data collection operations:

- Findings: A brief summary of significant findings that were evidenced in the results.
- Actions taken or lessons learned: A brief summary of any action taken or lessons learned as a result of the findings.
- Taxpayer participation (number of requests for taxpayer participation and number of interviews completed).
- Dates on which the data collection began and ended.
- Cost (excluding regular salaries of IRS employees).

Cost

The estimated cost for administering this survey is \$115,000.00

Statistical Contact

For questions regarding the study, questionnaire design, or the statistical methodology, contact:

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