
Attachment 1: Participant Screener Guide

This Screener’s Guide is to be used at the TEGE EO Information Booth at the 2007 Nationwide Tax Forums to screen visitors for participation in Draft Redesigned Form 990 Focus Groups.

Screener: Hello and thanks for your interest in _____. We are conducting a focus group tomorrow morning to discuss the draft, redesigned Form 990. Is this something you might be interested in participating in?

Yes → Continue

Q1: Have you ever completed a Form 990 on behalf of an exempt organization?

Yes → Continue

Q2: Have you reviewed the draft redesigned form the IRS released in June?

Yes → Continue

Q3: Will you be available to participate in a 1 ½ hour discussion at 9:00 am tomorrow morning?

Yes → Continue

Great, we’re looking forward to having your feedback. Here is a card with the information for tomorrow morning’s discussion. We will see you then [Provide information card].

No →

Thank person for his/her time.

Additional Information for Participants

- The focus group will be comprised of 8 – 10 conference attendees and will last approximately 1 ½ hours.
- No special experience or expertise beyond completing at least one Form 990 is required.
- The focus groups and information collected during the discussions are confidential. Participants will reveal only their first names and identifying information will not be requested, disclosed or retained.

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 study is 1545-1349. If you have any comments regarding this study, please write to:

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

Attachment 2: Participant Information Card

Thank you for agreeing to participate in the IRS Nationwide Tax Forum Focus Group for EO. Your input on the draft, redesigned Form 990 will be very helpful to us. Please be on time so that we can ensure an hour and a half discussion before concluding the session at 10:30 am. Your cooperation is very important!

What: Focus Group Discussion

When: Wednesday _____ 2007
10:30AM – 12:00 PM

Where:	<u>Location</u>	<u>Facility</u>
	Atlanta, GA	Hilton Atlanta, Club Room
	Chicago, IL	Hilton Chicago, Conference Room 4B
	Las Vegas, NV	All Suites Las Vegas, Room Palma B
	New York, NY	Hilton New York, Hudson Suite
	Anaheim, CA	Hilton Anaheim, Convention Center 208B
	Orlando, FL	Disney's Coronado Springs, Coronado BR B

(Please circle/highlight the appropriate location)

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 study is 1545-1349. If you have any comments regarding this study, please write to:

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

Attachment 3: Moderator's Guide

This guide provides for about 20 minutes of “people logistics” and 100 minutes of research time.

<i>Introduction</i>	<i>8 – 10 minutes</i>	<i>Moderator introduces self and leads participants to introduce selves, moderator lays out ground rules.</i>
Rapport & Reconnaissance	10 – 12 minutes	<p>Begin with general questions to form a picture of group dynamics, allow participants to learn group norms and expectations.</p> <p>Topics:</p> <ul style="list-style-type: none"> • Usage of the current 990 <ul style="list-style-type: none"> ○ Ease of use ○ What is good ○ What is bad ○ What would they keep ○ What would they change
In-Depth Investigation	60 – 75 minutes	<p>Transition to increasingly focused questions on key issues; obtain in-depth discussion and specific answers to questions on topic areas. Probe participants for range of opinions beliefs.</p> <p>Topics:</p> <ul style="list-style-type: none"> • Overall impression of redesigned form structure – core + 15 schedules <ul style="list-style-type: none"> ○ What is different (movement to schedules of information not applicable to all filers) ○ What do you like about the draft form? ○ What don't you like

Closure	8 – 10 minutes	<p>about the draft form?</p> <ul style="list-style-type: none">o Do changes address any of items mentioned in previous discussion of current 990?o Ease of useo Conflicts/burden associated with use?• Comprehensiveness of schedules<ul style="list-style-type: none">o Do participants have clients that would need to complete the schedules? (how many)o Any schedules the participants would like to see added? <p>Determine overall group attitudes towards specific issues, summarize opinions, appeal for any additional information. Acknowledge participants and thank them for their time and feedback.</p>
---------	----------------	--
