Office of Management and Budget
Clearance Package
OMB# 1545-1349

IRS Focus Group Sessions
Wage & Investment Customer Account Services

Practitioner Priority Service (PPS) Customer Satisfaction

March 16, 2009

Practitioner Priority Service (PPS) Customer Satisfaction Focus Group OMB PACKAGE

I. INTRODUCTION

W&I Customer Account Services (CAS) and Compliance will administer focus groups at the 2009 IRS Nationwide Tax Forum. Both CAS and Compliance will use this research to evaluate the level of customer satisfactions with the Practitioner Priority Service, determine customer needs, and identify work processes that need improvement.

Background/Overview - The Practitioner Priority Service (PPS) is a nationwide toll free, account-related service for all tax practitioners. It is the practitioners' first point of contact for assistance regarding their clients' account-related issues. The toll free service is available to all practitioners (with valid power of attorney declarations) by calling a single toll free number.

Objectives of this research are to determine:

- Are the services being offered meeting the practitioners' needs?
- What would they like to see done to improve the service?

II. METHODOLOGY

This study will be conducted by IRS employees at six forum locations. The methodology used for this study will be the focus group settings. There will be two focus group sessions per location. The sessions will be directed discussions with a group of approximately 12 people on the specific topic of the PPS. These sessions will provide the opportunity for CAS and Compliance to gather information from the tax professionals regarding the level of customer satisfaction. The IRS employees will actively recruit tax forum attendees before and between seminars. The target recruitment goal will be 24 participants per location (12 per session).

Sample Design – The population will include tax professionals who are attending the 2009 Nationwide Tax Forum and have used the PPS toll free line.

Data Collected – A total of 12 focus group discussions will be conducted all focusing on the level of customer satisfaction with the PPS. The IRS is interested in the client's experiences with the IRS/ Practitioner Priority Service and to solicit input on how to improve the service to them.

How Collected & Used – The information will be collected by directed discussions using moderators on the specific topic for each of the sessions. The data will be captured with the use of scribes and audio recordings. The data collected is qualitative in nature, and no critical decisions will be made by Wage & Investment (W&I) solely from the analysis of the data from these focus groups.

Dates Collection Begin/End / Location City & Facilities

July 7-9	Las Vegas, NV	Mandalay Bay Hotel
July 14-16	San Diego, CA	Town & Country Resort
August 4-6	Orlando, Fl	Caribe Royale Orlando
August 25-27	New York, NY	Hilton New York
September 8-10	Dallas, TX	Hilton Anatole
September 22-24	Atlanta, GA	Hilton Atlanta

Who is Conducting the Research/Where - Upon completion of all of the focus group sessions, CAS and Compliance employees will summarize and prepare an analysis of any significant findings that where present in the collected data.

Stipend - A stipend will not be given to participants for this study.

Cost – The estimated cost for this study is $22,000.00. This estimate includes travel, materials, printing, incentive items, and shipping cost.

Recruitment Efforts – The CAS and Compliance employees will initiate recruiting activities by canvassing and screening tax forum attendees before and between the seminars. The targeted recruitment goal would be 24 participants per location (12 per session).

Expected Response Rate – The expected response rate for each focus group is fifty percent: therefore recruiters will have to canvass a minimum of 50 attendees per location to meet the recruitment goal.

Methods to Maximize the Response Rate – To maximize response rates, this year the focus group topics will be advertised on the Nationwide Tax Forum Registration website. This will allow attendees to see what focus groups are being offered and then decide and plan in advance which focus groups that they may want to participate in.

Efforts to not Duplicate Research – This project is an ongoing, qualitative data collection effort that W&I is conducting with PPS to monitor and assess the practitioners' needs related to this product and to enhance information already received from the PPS surveys.

Participant Criteria – The participants for the 12 session will represent practitioners who have contacted the PPS line for assistance with their clients' account related issues.

Anonymity/Privacy/Disclosure/Security Issues – During the focus group, only the first name of participants will be used. The security of the data used in this project and the privacy of taxpayers will be carefully safeguarded at all times. All hard copy data will be maintained in a locked file cabinet. The screener data and group participant rosters will be destroyed once the recruiting task is completed. The IRS will apply and meet fair information and record-keeping practices to ensure privacy protection of all taxpayers.

III. PRA STATEMENT & OMB CONTROL NUMBER ON COLLECTION INSTRUMENTS

The Paperwork Reduction Act requires that the IRS display an OMB control number on all pubic 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 Avenue, NE,
Washington, DC 20224

IV BURDEN HOURS

There will be two sixty-minute focus group sessions per location. The target recruitment rate is 50 participants per location (24 per session plus 2 alternates). The estimated time to complete the participant screening is three minutes and the estimated time for each participant to take part in the focus group session is one hour. We will assume a 50% success rate in our recruiting of qualified participants. **The total estimated burden hours for this project will be 159 hours.**

Screening
50 potential participants X 3 minutes (screen) / 60 minutes = 2.5 hours per location.
2.5 hrs X 6 (locations).
The total estimate burden hours for screening participants equals 15 hours.

Focus Group Sessions
24 participants X 60 minutes (in session) / 60minutes = 24 hours per location. **The total estimate burden hours for the focus group sessions equals 144 hours.**