

**Participant Screener for TE/GE Customer Focus Groups
November/December 2009**

Recruiting Goals

- Five focus groups to be conducted over the phone.
 - Exempt Organizations (EO)
 - Employee Plans (EP)
 - Federal, State, and Local Governments (FSLG)
 - Tax Exempt Bonds (TEB)
 - Indian Tribal Governments (ITG)

Recruiting criteria

- Customer has participated in a TE/GE examination of their organization or client’s organization.
- Customer states they had sufficient experience with the examination to be able to provide feedback.
- Recruit for one hour.

Table 1: Focus Group Specifications

Location	Date	Time (all Eastern)	# of Recruits	Participants
Phone	TBD	TBD	10	EO
Phone	TBD	TBD	10	EP
Phone	TBD	TBD	10	FSLG
Phone	TBD	TBD	10	TEB
Phone	TBD	TBD	10	ITG

Participant Screener for TE/GE Customer Focus Groups

Introduction

Hello my name is _____. I'm calling from ICF Macro, an independent consulting firm. ICF Macro has recently been selected by the IRS to conduct telephone focus groups with customers who have been through an [INSERT FUNCTION] examination of their organization or a client's organization.

Screening Questions

Q1. Are you the person who was involved in the recent IRS examination of a tax return for [NAME OF ORGANIZATION]?

- Yes -> Skip to Q3
- No -> Continue

Q2. Who would be the best person for us to speak with about this?

- Gives referral -> Record name and phone number & terminate.
[Thank the person for his/her time.]
Return to Introduction and call the referral.
- Refuses to give referral -> Terminate [Thank the person for his/her time.]
- Don't know/Not sure -> Terminate [Thank the person for his/her time.]

Q3. Are you the taxpayer or a representative of the taxpayer?

- Taxpayer -> continue
- Representative -> continue

We are recruiting for an upcoming telephone focus group with other customers like yourself to discuss your experience with the [INSERT FUNCTION] examination process. The discussion will last approximately one hour.

The IRS will use your feedback to help them improve the examination process. We will not reveal the identity of anyone who participates to the IRS, nor attribute any of the feedback we receive to any individual.

Q4. Do you feel that you had enough involvement with the examination to be able to provide us feedback on your experience?

- Yes -> continue
- No -> terminate [Thank the person for his/her time]
- Don't know/Not sure -> terminate [Thank the person for his/her time]

Q5. The one-hour telephone focus group will be held on [INSERT DATE AND TIME]. Will you be able to participate?

- Yes -> continue
- No -> terminate [Record if person could participate on a different time/day]

Thank you. I'm glad that you will be able to join us!

Confirmation

I would like to send you a confirmation e-mail and instructions for calling into the group. May I have your email address? [RECORD; READ BACK THEIR EMAIL ADDRESS TO INSURE IT IS CORRECT.]

Name: _____
Phone: _____
Email: _____
Date of focus group: _____ Time: _____

We are only inviting a few people, so it is very important that you notify us as soon as possible if for some reason you are unable to attend. Please call [NAME] at [TELEPHONE NUMBER] if this should happen.

We look forward to speaking to you on [DATE] at [TIME]. We will give you a quick reminder call a day or so ahead of the focus group.

OMB # 1545-1349
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