

**IRS W&I Field Assistance**  
**Phone Focus Group Moderator's Guide - DRAFT**  
*(Notes to the moderator are in italics)*

**Overview**

Hello, I'm Jennifer Schranz from Pacific Consulting Group. I will moderate our discussion today. The topic we'll be discussing is your satisfaction with the IRS office you visited recently and your feelings about the service you received. The overall goal of the research is to provide information that will help the IRS provide better service to customers like you. Specifically, we are working with the IRS to make changes to their local offices. Your input is very important for establishing the areas of the process that need improvement. This is your opportunity to have input and to tell the IRS what your experiences have been and to make recommendations for change.

First, I would like to thank all of you for calling in today. Our discussion will take about one hour. We would like to know your real attitudes and feelings, so please be as open and frank with us as you can. We would like for you to think about your opinions of the IRS with regard to your interactions with them and not your opinions regarding tax laws specifically. We are recording this session, and we have some IRS personnel listening in with us, but please keep in mind that our focus here is on your experiences and opinions, not on your individual identities.

**Introductions**

*[Moderator: Gather responses in a roundtable fashion]*

To get started, let's introduce ourselves. Please tell us your first name; what IRS office you visited most recently, what day and time you visited, and your reason for going.

**Payments**

*[Moderator: Build from the introductions section. Did anyone visit to make a payment? If so, direct this question to him/her first and then open it up to the group. Skip section if no one used the TAC to make a payment recently or in the past.]*

First, I'd like to follow up on one of the main reasons people visit IRS offices. For those of you who visited an IRS office to make a payment

- Were you aware of other ways that you can make payments?
- *(If yes to above)* Why did you prefer this method as opposed to other options such as mailing in your payment?
- What could the IRS do differently to make you more comfortable using other methods to submit your payments?

**Physical Location Attributes**

*[Moderator: Open discussion but get response from everyone]*

Now let's talk about the IRS office itself. What are your opinions about the location you visited?

*Probes*

- *Accessibility*
- *Security*
- *Parking*

- *Cleanliness*

How about the hours of operation? Where those convenient for you?

The IRS is considering extending their hours. Which option would benefit you the most?

*[Moderator: round table – take vote]*

- Monday – Friday 8:30am to 4:30pm
- Monday – Friday 4:30pm to 6:00pm
- Saturday – 9:00am to 2:00pm
- Other (*specify*)

Which of these factors that we’ve discussed is most important to you? *[Moderator: recap accessibility, security, parking, cleanliness, hours of operation]*

## **Wait Time**

### Timeliness of Service

*[Moderator: Round table]*

Next, I would like to know your thoughts on the time you spent inside the IRS office. How long did you wait before being served and how long did you spend talking with an IRS representative?

*[Moderator: Open Discussion]*

- How do you feel about the time you waited?
- Do you have any suggestions for improving timeliness of the service?

### Improvement (Modernization) Ideas

*[Moderator: Open discussion]*

Now I would like you to think about suggestions for improving other instances when you wait in line for service. For example, when you go to an amusement park, Disney for example, you can choose to wait in the ride lines or you can purchase a “front of the line” pass. Another example is a doctor’s office where you make your appointment ahead of time and show up at your assigned time.

The IRS is considering options along these lines. Do you have any suggestions of what works well or something you would like to see the IRS try at its offices?

### *Probes*

- *Online appointments*
- *Modernization/New technologies*

## **Survey Process**

Next I’d like you to think about your recent visit. I’d like to ask each of you whether or not you received and completed a survey comment card. It’s a large postcard sized card with questions rating your satisfaction with your visit to the IRS office.

*[Moderator: round table – tally number receiving card and number completing card]*

For those of you who completed the card, please describe how you received the survey card (or knew about it), and how you went about completing and returning it.

For those of you who didn't complete a card, why did you choose not to complete it and could IRS do anything differently to encourage you to complete it?

Do you recall if any of the questions were difficult to read or answer? [*Moderator: open discussion*]

### **Overall Improvement**

The last question I have is:

What additional suggestions do you have for the IRS regarding how they can serve you better?

Probes: New technology

### **Wrap Up**

Those are all the questions that I have for this session. I want to thank you and the IRS wants to thank you, for participating in this discussion. PCG will be sending a \$50 token of our appreciation in the mail within two weeks.

**IRS W&I Field Assistance  
Phone Focus Group Recruiting Guide - DRAFT**

**INITIAL CALL**

Hello, I'm \_\_\_\_\_ and I'm calling from \_\_\_\_\_. You recently visited a local IRS office and indicated you would be interested in participating in a research study. We are calling to set-up this one-hour focus group call for the study. This is NOT a call about your specific case. Participation in the focus group will give you an opportunity to tell the IRS about your service experiences and the group can share their ideas for service improvements.

Your participation in this research is voluntary, but your help on this project would be very much appreciated. As a token of our appreciation for your time, you will receive \$50. Are you interested in participating? *[If no, thank taxpayer for their time, and hang up]*

The focus group will be held via telephone on DAY MONTH DATE at (TIMES Eastern Time). All participants will call a toll-free 800 number to join the conference call. The discussion will last about one hour. You will be joined by a group of about six people who, like you, recently visited a local IRS office. You will not be asked about your specific tax situation, only about your experience with this process. Would you be able to participate? *[If no, thank them and terminate the call].*

Are you or is anyone in your immediate family an employee of the IRS?

\_\_\_\_\_ Yes *[explain, thank, then terminate the call]*  
\_\_\_\_\_ No

*[Recruiter: note male or female]*

\_\_\_\_\_ Male  
\_\_\_\_\_ Female

We are delighted that you will participate in our group.

The dial in number is: XXXXXXXXX

The access code is: XXXXXX#

Do you have any questions? We would like some contact information to confirm the meeting and to mail out the token of appreciation for your participation.

Respondent Name \_\_\_\_\_

Respondent Address \_\_\_\_\_

We would also like to give you a reminder call on the day of the group. Would we reach you at this number or another? *[record number \_\_\_\_\_]*

The Paperwork Reduction Act requires that IRS provide an OMB Control Number on all approved public information requests. That number is OMB 1545-1432. Also, if you like, I can give you an address where you can send comments and questions regarding this process or suggestions for making it simpler.

READ ONLY IF RESPONDENT ASKS FOR ADDRESS: Send your comments and suggestions to:

IRS Tax Products Coordinating Committee  
Western Area Distribution Center  
Rancho Cordova, CA 95743-0001

Thank you and have a nice day. We look forward to speaking with you on:

DAY MONTH DATE at TIME  
DAY MONTH DATE at TIME  
DAY MONTH DATE at TIME

For record keeping:

\_\_\_\_\_ Confirmation letter mailed or faxed  
\_\_\_\_\_ Reminder call made

**REMINDER CALL**

Hello, I'm \_\_\_\_\_ and I'm calling from \_\_\_\_\_. This is a call to remind you of your participation in the telephone focus group scheduled for (DATE AND TIME). The dial in number is: XXXXXX. The access code is: XXXXXX#. Do you have any questions? (PAUSE AND ANSWER QUESTIONS). Thank you in advance for your participation.

# THE IRS NEEDS YOUR HELP \$50 FOR YOUR PARTICIPATION

We are looking for help on a research study to help with our communication efforts. The study involves participating in a one-hour phone discussion on **the week of XXXX**. A toll-free telephone number will be provided for the call.

The meeting will include about 6 taxpayers and will be led by a professional moderator, contracted by the IRS. You will be asked to share your experience about your visit to this IRS office. You will not be asked about your tax situation and your identifying information will not be shared in the results. Taxpayers will receive \$50 for their participation in the one-hour call.

If you are interested, please write your name and telephone number on the sign up sheet. Please note that participants are selected randomly from the list, so not all names will be contacted.

NAME

TELEPHONE NUMBER

_____	(____)_____
_____	(____)_____
_____	(____)_____
_____	(____)_____
_____	(____)_____
_____	(____)_____
_____	(____)_____
_____	(____)_____



**W&I Field Assist 2010 - Phone Focus Groups Confirmation Letter**

[DATE]

Thank you for your willingness to participate in a one-hour phone focus group interview of taxpayers to better understand the service you received and your service needs. This is NOT a call about your specific case. This is your opportunity to have input and to tell the IRS what your experiences have been and to make recommendations for change.

Your participation with this research is voluntary, but your help on this project would be very much appreciated. As a token of our appreciation for your time, you will receive \$50.

The focus group will be held by telephone on DATE at (STATE TIME FOR EACH TAXPAYER: TIMES Eastern Time). All participants will call in to a toll-free number to join the conference call. The discussion will last about one hour. You will be joined by a group of up to 8 people who, like you, have experience with the IRS's process. You will not be asked about your specific tax situation, only about your experience with this process.

We are delighted that you will participate in our group.

The dial in number is: XXXXXXXXXX

The access code is: XXXXXX#

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, you may write to the IRS.

Send your comments and suggestions to:

**Internal Revenue Service,  
Tax Products Coordinating Committee,  
Room #IR-6406  
1111 Constitution Ave. NW  
Washington, DC 20224**

Thank you and have a nice day. We look forward to speaking with you on: (STATE APPROPRIATE DATE AND TIME FOR TAXPAYER)

Thanks,

Mike Nagai  
Pacific Market Research  
1.877.271.2300