

**OMB Statement for
Field Assistance Customer Comment Focus Groups 10-1-09/12-31-10
Wage & Investment Division
BPA TIRNO-05-Z-00014, Task Request # 0091
Requisition W9W00USAA31**

Introduction/Background

IRS has replaced its traditional measures of accomplishment with a balanced measurement system consisting of business results, customer satisfaction, and employee satisfaction for the Wage & Investment (W&I) Division's Field Assistance (FA), an important service delivery channel, with 401 field offices serving walk-in customers. The overall goal of this task request is to provide meaningful feedback to managers and staff in those field offices.

The IRS has been measuring customer satisfaction in its Taxpayer Assistance Centers (TACs) since January 1998 using a survey card. Every taxpayer who requires a wait ticket from the Q-matic system is given a comment card. Taxpayers who are not assisted personally by an IRS employee are not given a comment card. Taxpayers are instructed to leave completed surveys in a drop box and the TACs mail them to the data collection subcontractor for processing. While this process has worked well in terms of generating a high volume of ratings, there are severe limitations with this current system:

- The survey administration process at the 401 TACs is highly decentralized and uncontrolled. A TIGTA audit report documents shortcomings in the implementation of the walk-in survey and says the statistical scores and comparisons imply more precision and accuracy than the data warrant.
- Many customers do not resolve their issues when they visit the TACs. For this reason, the typically high ratings may reflect their opinions of staff helpfulness; customer perceptions of the IRS's service performance often decrease as time elapses and their problems persist.
- The rating questions often leave doubts as to the specific nature of the customer's suggestion or complaint.

Addressing these issues with a tightly controlled sampling process would be very expensive, would be burdensome on IRS field employees, and could disrupt workflow in TACs. As a result of these issues, the IRS made a decision to change the basic character of the TAC Survey to a comment card-type of feedback mechanism. The goal of the Comment Card Survey is to provide specific qualitative feedback (i.e., comments) to sites. The comment cards still retain some rating questions, which will be tabulated and reported three times a year, but the emphasis would be on quick turnaround of comment card feedback to the offices where the comment took place. As experiences

in the private sector have shown, successful comment card programs have the following features:

- easy for customers to use;
- a standardized distribution and data collection process; and, use of technology to distribute feedback to sites quickly and at minimal cost.

Customer Satisfaction Focus Groups

There will be two Field Assistance Focus Groups conducted at by teleconference. The moderator's guide and screener script are attached.

The objective of the focus groups is to gain information that will assist the IRS in providing better service to Taxpayer Assistance Centers (TACs) customers. The focus group moderator's guide is based on Pacific Consulting Group's methodology, which asks respondents to evaluate various aspects of their experience and to provide input as to establishing the areas of the process that need improvement.

Methodology

The vendor, Pacific Consulting Group (PCG), will conduct two one-hour focus groups of TAC customers by telephone. The goal is to have a representative cross section of Field Assistance customers.

Estimates of the Burden of Focus Groups

Six TAC offices will be selected to use the pre-recruit form. Each of those offices will fill three sign up sheets. Each sign up sheet contains space for 20 names. 20 names * 3 sheets * 6 offices = 360 taxpayers to recruit from. We anticipate at the most, 1,000 taxpayers will need to be asked to sign up before we fill the sign up sheets with 360 names.

The burden hours reflect the time the 1,000 taxpayers will spend considering to sign up initially followed by the time to recruit our focus group participants over the phone for the 360 who do initially sign up as well as the time spent in the focus group for the 16 final participants.

Expected burden hour estimates as follows. Recruiting of non-participants estimate of 1000 at 3 minutes each and recruiting of participants estimate of 360 at 5 minutes each for a total estimated burden for recruitment of 80 hours. The two Focus Group sessions estimate 16 participants who dial in at 60 minutes each for an estimated burden of 16 hours for the Focus Group sessions. The total estimated burden is 96 hours.

Stipend

OMB Supporting Statement
W&I CARE, Field Assistance
Field Assistance – Focus Groups

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Respondents will be recruited by telephone and participants will be offered an honorarium of \$50 each. The stipend has been used in previous IRS W&I Focus Groups as an incentive for participation. The stipend is customary in the Market Research industry and currently stipends range from \$50 to \$75 for participants in the telephone focus groups.

Other Information

The following information will be provided to the Organizational Performance Division 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.
- Number of participants per focus group.
- Number of requests made for taxpayer participation
- Focus group dates.

The estimated cost for the focus group is \$10,311.

The period of performance is December 1, 2009 through June 30, 2010.

Statistical Contact

For questions regarding the Focus Groups and methodology, contact:

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