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## Attachment 1: DRAFT Participant Screener Guide

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This Screener’s Guide is to be used at the TEGE EO Information Booth at the 2008 Nationwide Tax Forums to screen visitors for participation in EO CE&O Focus Groups.

**Screener:** Hello and thanks for your interest in \_\_\_\_\_. We are conducting a focus group Wednesday afternoon at \_\_\_\_\_ to discuss EO Educational materials such as our website, StayExempt.org. Is this something you might be interested in participating in?

Yes → Continue

Q1: Have you ever prepared or been involved in the preparation of an application for exempt status or annual reporting forms for an exempt organization?

Yes → Continue

Q2: Have you read or used of any of the educational materials distributed by EO? (*Refer to materials displayed or name some of the web materials.*)

Yes → Continue

Q3: Will you be available to participate in a 1 ½ hour discussion at \_\_\_\_\_ on Wednesday afternoon?

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.

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### 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 familiarity with or usage of some of Exempt Organization’s educational materials.
- 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.

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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 XXXX-XXXX. 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

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## Attachment 2: DRAFT Participant Information Card

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Thank you for agreeing to participate in the IRS Nationwide Tax Forum Focus Group for EO. Your input 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 \_\_\_\_\_. Your cooperation is very important!

What: Focus Group Discussion

When: Wednesday \_\_\_\_\_ 2008  
\_\_\_\_\_ PM

| Where: | <u>Location</u> | <u>Facility</u>  |
|--------|-----------------|------------------|
|        | Atlanta, GA     | To be identified |
|        | Chicago, IL     |                  |
|        | Orlando, FL     |                  |
|        | Las Vegas, NV   |                  |
|        | New York, NY    |                  |
|        | San Diego, CA   |                  |

(Please circle/highlight the appropriate location)

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## Attachment 3: DRAFT Moderator's Guide

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This guide provides for about 10 minutes of “people logistics” and 80 minutes of research time.

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|--------------------------|-----------------------|--|
| <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 | 15 –25 minutes        | <p>Begin with general questions to form a picture of group dynamics, allow participants to learn group norms and expectations.</p> <p><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• What is your general experience with tax exempt organizations? <ul style="list-style-type: none"> <li>o Why does an exempt org contact a practitioner</li> <li>o For what sorts of problems do exempt orgs seek practitioner experience?</li> </ul> </li> <li>• Are any participants members of stakeholder groups?</li> </ul> |
| In-Depth Investigation   | 35 – 45 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><b>Topics:</b></p> <ul style="list-style-type: none"> <li>• Sources of information: Where do you go for information to assist an exempt org?</li> </ul> <p><b>Probes:</b></p> <ul style="list-style-type: none"> <li>o Stakeholder groups</li> <li>o IRS website</li> </ul>   |

|         |            |  |
|---------|------------|--|
| Closure | 10 minutes | <ul style="list-style-type: none"><li><input type="radio"/> Other</li><li>• Publications:<ul style="list-style-type: none"><li><input type="radio"/> What, if any IRS pubs are used?</li><li><input type="radio"/> How are IRS pubs used?</li><li><input type="radio"/> Do you use IRS pubs to educate your clients or as a job aide?</li></ul></li><li>• Distribution:<ul style="list-style-type: none"><li><input type="radio"/> How efficient is the web at disseminating our publications?</li><li><input type="radio"/> Have you received feedback from your clients on our web materials?</li><li><input type="radio"/> What do you think is the best way to get the materials into the hands of EOs that need them?</li></ul></li></ul> <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> |
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