

OMB Package **CS-08-093C**

A Customer Satisfaction Study For IRS Web Site Help Desk

Justification for Proposed Changes to an Approved Survey Instrument

IRS.gov Help Desk Survey (CS-08-093), was approved by OMB in May of 2008. Based on the findings, W&I/ETA propose to make changes to the survey instrument and again survey visitors to the site.

The burden and cost estimates for this data collection has not changed from the original submission, only the collection beginning and end dates have changed. The proposed changes to the survey instrument are highlighted in the attachments

Introduction

In order to evaluate the service provided by the IRS Web Site Help Desk, the IRS is interested in determining levels of customer satisfaction with the service being provided to IRS Web site visitors who call the IRS Web Site Help Desk for assistance.

Objectives of Research

The objectives of this research are to:

- Determine overall customer satisfaction with the IRS Web Site Help Desk.
- Determine areas of possible improvement in this IRS service.

Methodology

This study would be conducted via telephone, e-mail and at the end of chat sessions. The contractor is AFFINA Corporation, and all interviewing would be conducted from its national headquarters in Peoria, IL. There are three separate surveys depending on the method of contact used by the participant. Those who call the Help Desk will get an IVR automated telephone survey, those who use e-mail to contact the Help Desk will be invited to participate in an online survey as will those who contact the Help Desk in a live chat.

Contacts to the IRS Web Site Help Desk will receive an invitation to participate in the survey depending on their method of contact. Invitees will be chosen on an nth sample, random basis.

After the survey is completed, AFFINA will tabulate the data and prepare a report of findings.

The survey package is being forwarded to OMB for approval. Attachment 1 contains the survey for the study. This survey includes general questions to determine satisfaction with the service provided by the IRS Web Site Help Desk.

Sample Design

A minimum goal of 400 surveys will be conducted of visitors to the IRS.gov Web site who contact the IRS Web Site Help Desk for assistance. A sample size of 400 will provide a 95% confidence level that the population of callers is represented in the survey. Visitors will be chosen at random to receive an invitation to voluntarily participate in the survey.

Data Collection Date

Data will be collected via IVR automated telephone interviewing, e-mail and chat by AFFINA Corporation in a 3-month period in January through March 2010, assuming OMB authorization is received in time.

Data to be collected

This survey will collect customer's overall satisfaction with the service provided by the IRS Web Site Help Desk.

How data will be used

Data will be used to evaluate current satisfaction levels and areas for improvement for the IRS Web Site Help Desk.

How data will be analyzed

Analysis of the survey data, including but not limited to frequencies, means, regression, and significance testing, will be conducted by AFFINA Corporation using SPSS for Windows, a data analysis and statistics software.

Who is conducting research?

This research will be conducted by AFFINA Corporation. AFFINA Corporation will conduct all fieldwork, tabulation, analysis and reporting, and additionally provide IRS with results in Microsoft PowerPoint.

Location

This survey will be fielded from AFFINA Corporation's Headquarters in Peoria, IL.

Cost of Study

The total cost of this study is \$4,876.00. This includes an initial start-up cost of \$2,226.00 and \$2,650.00 to administer the survey and to process and report of the results.

Stipend

Survey participants will not be paid a stipend for participation.

Burden Hours

The survey will take approximately 3 minutes to complete across 400 respondents.

Based on the in-going goal being n=400 ending sample size and an invitation rate as high as 40%, a total of 4000 potential respondents will have to be invited to participate in order to reach the 400 ending sample, assuming 15% accept the invitation and 67% of those participate. 4000 potential respondents minus 400 sample size leaves 3600 non-participants.

- The contact time to determine non-participation could be up to 1 minute, averaging approximately 30 seconds, with the resulting burden for **non-participants** being $3600 \text{ non-participants} \times 1 = 3600 \text{ minutes} / 60 \text{ minutes} = \mathbf{60 \text{ burden hours}}$.
- Then, for those who do participate, the length of the survey is 3 minutes, with the time burden for that group being $400 \text{ participants} \times 3 \text{ minutes} = 1200 \text{ total minutes} / 60 \text{ minutes} = \mathbf{20 \text{ burden hours}}$.
- **Thus, the total burden hours for the study would be (60 non-participant burden hours + 20 participant burden hours =) 80 hours.**

With regard to the low response rate, the IRS will assume that all data collected from this survey is qualitative in nature, and that no critical decisions will be made by Electronic Tax Administration / Public Portal Branch solely from the analysis of data from this survey. The results from this survey are simply one piece of a larger set of information needed to assess practitioner/taxpayer needs related to services provided by the IRS.

Efforts to not duplicate research

This research is part of the performance measures of the IRS Web Site Help Desk and do not duplicate other research currently being conducted.

Privacy, Security, Disclosures, Anonymity

AFFINA Corporation has in place strict procedures for non-disclosure of respondent information. No personally identifiable information will be collected during this survey. In addition, this survey will be conducted in an automated manner with no interaction from AFFINA or IRS staff.

Attachment 1

Questionnaire for the survey – a single questionnaire covering all target audiences. The estimated length of the survey is no more than 3 minutes.