

**OMB STATEMENT FOR THE
PRIVATE DEBT COLLECTION AGENCY CUSTOMER SATISFACTION SURVEY
FOR THE SB/SE DIVISION
BPA TIRN0 05-Z-00014, TASK ORDER # 0072
DATA COLLECTION PERIOD APRIL 2008-MARCH 2009**

Introduction

Per the American Jobs Creation Act, signed by the President on October 22, 2004, a new Section 6306 of the Internal Revenue Code permits private collection agencies (PCAs) to help collect federal tax debts. Under the Act, the IRS would refer only those outstanding tax liabilities that the PCAs would be able to work effectively and appropriately. Private collection agencies will be locating and contacting taxpayers via mail and telephone to advise them of the available options for repayment of their delinquent taxes. During the period of performance, the IRS will evaluate the overall program and Contractor performance quarterly based upon cumulative results of customer satisfaction surveys.

Customer Satisfaction Survey

Pacific Consulting Group (PCG) has developed and will administer a customer satisfaction survey of PCA customers and analyze and report survey results for the two PCAs for a period of performance, beginning February 1, 2008 and concluding May 31, 2009. The data collection period of this task order is one year, from April 1, 2008 through March 31, 2009. The two primary objectives are to (1) Develop and implement a customer satisfaction measurement approach that meets the requirements of the PCA evaluation framework, and (2) Provide analysis and reporting for the overall program and by each PCA. This survey provides the measurements that constitute the customer satisfaction component of the PCA's balanced scorecard

Survey scoring for this contract is based on the Customer Satisfaction Survey Score response average to the keystone question, "Everything considered, whether you agree or disagree with the final outcome, rate your overall satisfaction with the service you received during this call." Questions utilize a 5-point rating scale, with 1 being very dissatisfied and 5 being very satisfied. All survey responses generated are kept confidential. The subcontractor ensures that customers responding to the survey are guaranteed anonymity. Taxpayers are identified only by whether the call was inbound or outbound and whether the call was an initial or follow-up contact.

The PCA Customer Satisfaction Survey has already been developed and is attached as Attachment 1. The survey is conducted via an interactive voice response (IVR) system. Completion of the survey takes approximately seven minutes. It contains a standard set of questions including the following:

- Have you received any letters from a private collection agency regarding your tax bill

- Please rate your satisfaction with being able to understand the meaning of letters you received from the Private Collection Agency
- Please rate your satisfaction with the tone of the letters.
- Now thinking about your call today, please rate your satisfaction with the length of time you spent on the call
- Please rate your satisfaction with how courteous the (PCA) representative was
- Rate your satisfaction with the (PCA) representative's willingness to help you with your issues
- Rate your satisfaction with the fairness with which you were treated.
- Rate your satisfaction with the knowledge of the (PCA) representative
- Rate your satisfaction with getting all the information you needed during the call.
- Rate your satisfaction with the (PCA) representative taking your circumstances into consideration
- Rate your satisfaction with the collection agency keeping you informed of the status of your case
- Rate your satisfaction with the (PCA) representative's explanation of your payment options
- Everything considered, whether you agree or disagree with the final outcome, rate your overall satisfaction with the service you received during this call

Design and Methodology

As stated above, the survey is conducted as an IVR survey administered to taxpayers who call or are called by a PCA. At the conclusion of the PCA call, callers will be randomly selected and ask to participate in the survey. Willing participants are asked a few questions by the PCA customer service representative and then transferred into the survey. We anticipate a 60% response rate. Standard procedures are used in order to obtain the highest response rate possible.

The contractor will document the sampling plan, including the target population and sampling frame, sampling specifications, expected reliability of the sample estimates, sampling limitations, preliminary sampling weights, and the strategy for achieving target quotas within key strata.

To allow for quarterly validity at the site and national levels, the following sample size (stratified by two PCAs) has been determined (this sample size will remain valid even as right party contacts increase):

- 200 completes per PCA per month
- 1200 completes for both PCAs per quarter
- 2400 completes per PCA annually
- 4800 completes for both PCAs annually

The taxpayer satisfaction survey is currently in field and will be continued following the OMB clearance of the survey questionnaire.

Evaluation

The contractor provides a monthly summary of the overall satisfaction ratings for each PCA and for both PCAs overall. Each quarter, the contractor summarizes the quantitative ratings and produces an overall national report showing customer satisfaction scores on all survey items and overall improvement priorities. This report shows overall results and results stratified by PCA, and it includes the following:

- Improvement Priorities for PCAs
- Survey Response Rates
- Differences in Call Type (Inbound or outbound) and Type (initial contact or follow-up) over Time
- Average Satisfaction Rating for each Question and PCA
- Average Customer Satisfaction Ratings over Time
- Improvement Priorities by PCA
- Top Priority Improvement Areas overall

The contractor includes any relevant database variables in the analysis. The contractor and IRS have agreed on the exact specifications and contents of the report.

Estimate of the Burden of Data Collection

The survey interview has been designed to minimize burden on the taxpayer. The time that a respondent takes to complete the phone survey has been carefully considered and only the most important areas are being surveyed. The average time of survey completion is 7 minutes. The questions are generally one sentence in structure and on an elementary concept level.

We have made every attempt in designing this survey to maximize response rate. Using the response rate of 45%, the total estimated annual burden in hours is estimated to be 584 hours, broken down as follows:

Respondents: $4,800 \times 7 \text{ minutes} = 560 \text{ hours}$

Non-respondents: $5,867 \text{ surveys} \times 15 \text{ seconds} = 24 \text{ hours}$

The grand total is estimated to be 584 hours.

The Task Order cost for this period of performance is \$128,366.

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 this office 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.

Other Information

The following information will be provided 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 completed surveys.
- Dates on which the data collection began and ended.
- Cost (excluding regular salaries of IRS employees).

Statistical Contact

For questions regarding the study, questionnaire design, or the statistical methodology, contact:

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