

**Appeals Division**  
**Customer Satisfaction Telephone Survey**  
**STATEMENT OF WORK - MODIFICATION**  
**Task Request –APPEALS**

**APPEALS SURVEY TO MEASURE CUSTOMER SATISFACTION CASEWORK**

**TIRNO-05-Z-00012**

**Task Request # Z-7-Z1-01-AP-A20 000**  
**June 24, 2008**

**WHEREAS**, the IRS Appeals Office has already exercised Item No. 1001 for Option Year 1 – FY 2008 Collect Initial Data (2 waves) for the above referenced Task Order,

This additional modification is to increase the sample size in order to decrease the margin of error at the 95% confidence interval, to add additional reports at the Area Level, and to add a presentation to Area-Level Managers.

Sample Revisions and Sampling Plan

The projected number of closures from October 1, 2007 through September 30, 2008 is 108,000 cases.

The sample size is to be determined based on an annual precision rate of better than 3.0% (at a 95% confidence level or better) at the national level and 10.0% by Category within each Area. The Appeals Areas are 1, 2, 3, 4, 7, 8, 9, and AT/TG with Campuses grouped with their respective areas. Categories are Collection Due Process (CDP), Offers-in-Compromise (OIC), Innocent Spouse (INNISP), Penalty Appeals (POSTPEN), Coordinated Industry Cases (CIC), Industry Cases (IC), Examination/TEGE (EXM/TEGE), and Other.

Appeals estimates the sample structure as follows:

<b>National Sample</b>			
	<b>Population</b>	<b>Sample</b>	<b>95% +/-</b>
<b>Total</b>	107,101	3582	2.3%

<b>Sample by Area and Category</b>				
<b>Area</b>	<b>Category</b>	<b>Population</b>	<b>Sample</b>	<b>95% +/-</b>
<b>1</b>	CDP	102	36	13.2%
	OICC	2367	92	10.0%
	INNISP	57	20	17.7%
	POSTPEN	1167	89	10.0%
	IC	77	27	15.2%
	EXM/TEGE	7355	95	10.0%

	OTHER	290	72	10.0%
<b>2</b>	CDP	11464	95	10.0%
	OICC	3904	94	10.0%
	INNSP	8		
	POSTPEN	351	75	10.0%
	IC	0		
	EXM/TEGE	20		
	OTHER	2004	92	10.0%
<b>3</b>	CDP	8346	95	10.0%
	OICC	1725	91	10.0%
	INNSP	2579	93	10.0%
	POSTPEN	157	55	10.7%
	IC	93	33	13.8%
	EXM/TEGE	3428	93	10.0%
	OTHER	1489	90	10.0%
<b>4</b>	CDP	224	67	10.0%
	OICC	108	38	12.9%
	INNSP	143	50	11.2%
	POSTPEN	751	85	10.0%
	IC	175	61	10.1%
	EXM/TEGE	7623	95	10.0%
	OTHER	689	84	10.0%
<b>7</b>	CDP	5138	94	10.0%
	OICC	1275	89	10.0%
	INNSP	120	42	12.2%
	POSTPEN	502	81	10.0%
	IC	199	65	10.0%
	EXM/TEGE	5177	94	10.0%
	OTHER	2090	92	10.0%
<b>8</b>	CDP	7028	95	10.0%
	OICC	845	86	10.0%
	INNSP	81	28	14.8%
	POSTPEN	208	66	10.0%
	IC	117	41	12.3%
	EXM/TEGE	7621	95	10.0%
	OTHER	679	84	10.0%
<b>9</b>	CDP	2899	93	10.0%
	OICC	1064	88	10.0%
	INNSP	97	34	13.6%
	POSTPEN	7041	95	10.0%
	IC	155	54	10.7%
	EXM/TEGE	6293	95	10.0%
	OTHER	1008	88	10.0%

<b>AT/TG</b>	CDP	1		
	OICC	1		
	INNRP	0		
	POSTPEN	3		
	IC	159	56	10.6%
	EXM/TEGE	85	30	14.5%
	OTHER	0		
	CIC	519	81	10%
<b>Total</b>		107101	3582	2.3%

Based on discussions with Appeals, the contractor shall develop and submit a formal Sampling Plan describing the source of the sample, stratification of the sample, and sample size. The contractor will clearly identify any sampling strata that may not generate results at the designated margin of error. This Sampling Plan should be submitted within 1 weeks of acceptance of this modification.

#### Addition of Area-Level Reports

Based on discussions with Appeals, the contractor shall develop Area-Level reports. These reports will be in a mutually agreed format, such as PowerPoint slides or 1-3 page profile reports in Excel. These reports will be functional on the Internet. Draft and Final versions of these reports will be submitted on the same schedule as the National Report.

#### Additional Presentation to Area-Level Managers

In addition to the Executive-Level Briefing, the contractor will provide an additional briefing to Area-Level Managers. The contractor will provide electronic copies of the briefing materials in advance. Appeals will produce hard copies, if desired. The contractor should assume that the briefing will be in the Washington, DC area.