

Notice Simplification Web-Based Survey
Understanding the Effectiveness of Notice Redesigns

Internal Revenue Service

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Notice Simplification Web-Based Survey

Understanding the effectiveness of notice redesigns

I. Introduction

Background/Overview:

Between December 2008 and January 2009 the Internal Revenue Service (IRS) TACT team, with assistance from Porter Novelli, Siegel+Gale and GMI Research will be conducting an web-based research study to determine the effectiveness of IRS notice redesigns.

Objectives of Testing:

The primary objective of this web-based research is to understand respondent behavior and comprehension to existing notices and their re-designs.

II. Methodology:

Porter Novelli and Siegel+Gale will be working with GMI Research and IRS TACT to develop a web-based research tool to collect comments from general US consumers. The research will be based on voluntary participation by a specific segment of the population that GMI Research has identified as qualified respondents

The potential size of the this research will be approximately 1,200 US taxpayers

Data Collection Date:

The web-based survey will be available to receive comments from December 17, 2008 until January 9, 2009, or approximately three weeks. The research will end by January 9, 2009 or when research has been collected from 1,200 respondents whichever occurs first. It is important for the respondents to complete the survey within this targeted timeframe in order to adhere to the schedule outlined in the contract. If there is a delay in completing this research it will alter the timeline and extend the delivery date.

Data To Be Collected:

The web-based research study will collect answers related to perception and comprehension of both “before” and “after” versions of the IRS notices.

How Data Will Be Used:

The research data and findings will be used to validate the improvement of IRS notices, create a benchmark and a library of modules to be used in future notice re-design efforts.

How The Data Will Be Analyzed:

Porter Novelli and Siegel+Gale along with GMI will use the research collected via the web-based survey as a source for notice re-design. The web-based research will be reviewed, analyzed and answers summarized. GMI will document the summary findings and anecdotal of the research and develop recommendations from the information collected. Summary analysis will validate the proposed content and design direction, with suggested areas for improvement.

Who Is Conducting The Research:

GMI, working closely with Porter Novelli, Siegel+Gale and IRS TACT

Location:

Research respondents will be drawn from all locations in the United States.

Stipend:

A point stipend worth a minimum of \$10.00 will be provided for each completed survey. Points can be redeemed for a check that is mailed to the respondent or can be redeemed on-line. The purpose of the stipend is to encourage participation, and to thank respondents for sharing their time and contributions to our research.

Recruitment Efforts:

Recruitment efforts are non-existent as individuals that make up the GMI-MR panel have already agreed to participate in web-based surveys and receive survey invites.

Expected Response Rates:

Most likely 70%-80%

Survey Structure:

Porter Novelli, Siegel+Gale and IRS TACT will test three types of IRS notices in pairs, before vs. after.

1. CP2000
2. Monthly Statement
3. LT 11

“Before” and “After” versions of documents will be rotated to eliminate any order effect bias.

The average length of time to complete a survey will be 15 minutes

Efforts To Not Duplicate Research:

This research is not duplicative and is needed to understand the effect of simplifying notices has on tax payer behavior.

III. Participant Criteria:

Participants in this survey will be limited to individuals over the age of 18 that reside in the U.S. and have filed a tax return in the last five (5) years.

IV. Privacy/Disclosure/Security Issues:

Porter Novelli and Siegel+Gale will ensure compliance with the Taxpayer Bill of Rights II. All participants will be treated fairly, Porter Novelli and Siegel+Gale will maintain anonymity without attribution of respondent, and protect their data from inappropriate usage. Participants will be instructed not to provide any private or taxpayer data, any identifying information, nor will any specific tax situation question be asked. The survey data will be protected on survey deployment server, its integrity maintained during data capture, analysis, and usage, as well as sharing and transmission to the IRS.

V. Burden Hours:

Participants in the web-based survey will be required to respond to the specific questions on the survey. They will not be required to provide any information prior to the survey, nor will they be contacted to request additional information after the survey.

The desired response for the survey is 1,200 participants. It is estimated that the survey will take no longer than 15 minutes for a participant to complete.

Therefore, the total burden involved in the survey will be 400 hours (1,200 participants X 20 minutes per survey equals 24,000 minutes; 24,000 minutes divided by 60 minutes/hour = 400 hours).

Estimated Burden Hours	
400 hours	For participants to complete the web-based survey
400 hours	Total estimated burden

VI. Research Cost:

\$13,700 plus a 13.75% markup in accordance with the IRS/Porter Novelli contract