IRS Communications & Liaison
Nationwide Tax Forums
Customer Satisfaction Survey 2010

Exception Justification:

The Nationwide Tax Forums provide a forum: to exchange information between outside stakeholders, such as industry experts, and IRS Executives that often result in recommendations that improve tax administration; to promote awareness of IRS initiatives; to educate over 14,000 tax professionals on various tax topics; to conduct focus groups; to offer CPE credits to tax practitioners; and to establish a positive relationship with the tax practitioner community. The Tax Forums provide IRS leadership with feedback so that programs and initiatives can be revised to create less burden on the public.

The objectives for the Nationwide Tax Forum survey are:

> As part of an IRS agency-wide initiative, to monitor and improve taxpayer and stakeholder satisfaction with the program; To identify what Nationwide Tax Forum staff and managers can do to improve customer satisfaction; To gauge customers' preferences for various aspects of the program; and to track customer satisfaction with the program over time.

The Nationwide Tax Forums are scheduled annually from June to September and in different parts of the United States (for 2010, the six tax forums scheduled will be in Atlanta, Las Vegas, Chicago, Orlando, New York, and San Diego). Within two weeks after each tax forum the vendor emails a customer satisfaction survey to those attendees that volunteered to complete it and provided their email addresses. Upon completing the survey, the responses are sent directly to the vendor. After the last tax forum, the vendor analyzes the survey responses and prepares a report.

By gathering the feedback after each forum, the data analysis of the responses may indicate trends/issues in an area of the country that we could not otherwise obtain anonymously. For example, the Customer Satisfaction report includes, by tax forum: the three improvement priorities, the average satisfaction rating per question, number of surveys sent and responses received. If the volunteers were asked to identify the tax forum attended, they may not believe that their responses were anonymous and would not complete the survey.

Also, by collecting the information as close to the event as possible results in a higher response rate and the attendees responses are more reflective of the actual event. For example, the 2009 survey was sent two weeks after each tax forum except for Atlanta, which was sent three weeks after the tax forum. The Atlanta response rate was less compared to those sent within two weeks after the tax forum.

Contact: Linda McBurney - 706-650-3295

IRS Communications & Liaison
Nationwide Tax Forums
Customer Satisfaction Survey 2010

Background

The mission of the Office of Communications & Liaison (C&L) is to enable the Internal Revenue Service (IRS) to achieve its strategic business objectives by integrating communications across the agency, and managing interactions and information sharing with key internal and external stakeholders. Our efforts produce widespread public acceptance and understanding within the Congress, the news media, practitioner groups and the state and local community.

Our involvement also enables IRS business units to obtain faster, pre-decisional engagement of stakeholders to make more informed and better operational decisions that affect taxpayers. C&L is instrumental in achieving employee understanding of IRS priorities – thus shoring up employee support and commitment to the Agency's mission. In addition to initiative-specific work that supports IRS business units, C&L actively pursues performance improvements within our own operations – driving for efficiency and cost-effective business processes.

The Nationwide Tax Forums provide the mechanism through which information exchange occurs between outside stakeholders including industry experts and IRS Executives. The Tax Forums provide a link to the American Taxpayer and promote awareness of major IRS initiatives. The Forums increase the public's perception of the Commissioner's strategic initiatives; ultimately resulting in recommendations that improve tax administration. This past year, the Tax Forums' accomplishments included, but were not limited to: (i) Providing tax related educational seminars to over 14,000 tax professionals; (ii) communicating the IRS' strategic plan for 2005-2009; and (iii) providing IRS leadership with feedback from these practitioners so that programs and initiatives can be revised to create less burden on the public.

The Tax Forums create a platform for conducting focus groups, offering CPE credits to our practitioners, furthering the public's use of electronic means to interact with the IRS, and establishing a positive relationship with the tax practitioner community.

Objectives

The objectives of this survey are to:

- Gauge overall customer satisfaction with the program.
- Determine what our customers' value.
- Assess the need for change in program administration.
- Identify areas needing improvement to strengthen the program.
- Ensure customer input is included in strategic program planning.

Methodology

A survey, including an invitation to participate in it, will be distributed electronically 7-14 days after each Tax Forum to the attendees. The email will include a unique login name and a password for each respondent for the survey. When the survey is completed, the respondents will receive the message:

"Thank you for completing this survey. The results will be used to help identify areas of service that need improvement in the IRS Nationwide Tax Forum."

The results of the survey will be tabulated, analyzed and incorporated into program administration.

Schedule for Surveys

2010 Surveys	**Nationwide Tax Forum:**	**Survey Conducted after each Tax Forum**
	▪ June 21-24 Atlanta, GA	▪ July 19 - Aug 9
	▪ July 12-15 Chicago, IL	▪ Aug 9 - Sep 2
	▪ July 26-29 Orlando, FL	▪ Aug 23 - Sep 13
	▪ Aug 9-12 New York, NY	▪ Sep 7 - Sep 28
	▪ Aug 23-26 Las Vegas, NV	▪ Sep 20 - Oct 11
	▪ Aug 30–Sep 2 San Diego, CA	▪ Sep 27 - Oct 18

The detailed schedule for sending the surveys, the data collection period and the due date for the Analysis Report are shown in Attachment A.

Methods to Maximize Response Rate

After the initial email is sent to the Tax Forum attendees inviting them to participate in the survey, up to two follow-up emails will be sent to those who have not completed the survey urging them to respond. Each follow-up email will include the respondent's unique URL, login name and password. Attachment B is a sample of the email invitation and reminders.

Historically, about 53% responded and we expect the same response rate for this year's survey.

Survey Design

C&L engaged the vendor, Pacific Consulting Group (PCG), to develop the survey instrument. The survey questions do not ask for any taxpayer information but address the Tax Forum events, presenters, booths, etc., and integrates the feedback received from the attendees. Attachment C is the survey.

Data Analysis

All customer satisfaction survey responses will be sent directly from the respondents to PCG for processing. After all of the Tax Forums data collection periods have ended, the quantitative customer satisfaction ratings will be summarized and a report will be produced for the Nationwide Tax Forums.

Efforts to Not Duplicate Research

C&L's Office of National Public Liaison has the sole responsibility for coordinating the Nationwide Tax Forums and the customer survey feedback which is one of their balanced measures. The one survey instrument is used for all of the Tax Forums conducted that fiscal year. It would be revised for future Tax Forums based on the previous year's feedback and any new items integrated in the Tax Forums for that year.

Participants Criteria

The criterion for the survey is that the participants are registered attendees at the Tax Forums and that they have agreed to receive the survey through email.

Privacy, Security, Disclosure, Anonymity

The Nationwide Tax Forum survey involves no taxpayer Information and the survey will be sent to only those attendees who agree to be contacted. We will provide only first name, last name and email addresses of those Tax Forum attendees to the vendor. All survey responses will be sent directly to the vendor.

PCG will maintain the contact information and data collection method, such as databases, on servers that have been reviewed and certified by the IRS Computer Safeguards program. The annual safeguarding reports are available from either the IRS Contracting Officer, Jeffrey M. Jackson, or the Contracting Officer's Technical Representative, Cynthia Lee.

Cost

Total cost for the Surveys: $42,000

Burden Hours

Recruit by sending 4,300 email invitations x 1 minute = 4,300 minutes/60 = 72 hours
Based on a historical response rate of 53% x 4300 = 2,279 x 8 minutes to complete questionnaire = 18,232 minutes/60 = 303 hours

Estimated Total Burden for Surveys = 18,232 minutes or 375 hours

Note: Over 14,000 registered for the tax forums but only 4,300 agreed to participate in the customer satisfaction survey.

Attachments

Attachment A: Schedule of Nationwide Tax Forums Customer Surveys
Attachment B: Survey Invitation and Reminder Emails to Attendees
Attachment C: Tax Forum Questionnaire