

**Office of Management and Budget
Clearance Package**

**Survey of TE/GE Customers for
“Stay Exempt” Web-Based Training**

Internal Revenue Service
Tax Exempt and Government Entities Division

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Background

The Customer Education and Outreach (CE&O) office of Exempt Organizations within the Tax Exempt and Government Entities (TE/GE) operating division of the IRS assists tax-exempt organizations in understanding their tax compliance requirements. CE&O does this by producing a variety of written and online publications and by sponsoring live seminars and workshops.

Since 2000, CE&O has held annual workshops in six or more cities across the country for individuals who work with small and medium size tax-exempt organizations. In order to reach a larger audience, CE&O developed a web-based version of this workshop at www.stayexempt.org. The target audience for this product includes staff and volunteers of organizations exempt under section 501(c)(3) of the Internal Revenue Code. The web site contains five interactive modules users can complete individually. At the end of each of the five modules, the user can elect to take a survey regarding the effectiveness of the training module. The survey results provide CE&O with valuable feedback that allows us to improve future training.

The original site launched in January 2007. In mid-2008, CE&O began to add “mini-courses” to the site to supplement and extend the training. These mini-courses were in a different format than the original modules and did not include a survey option. In 2010, CE&O will launch a redesigned version of the web site that will permit more efficient navigation of the site. On the new site, the survey option will be made available to users of the 15 mini-courses as well as the original five modules. The same survey will be used for all of twenty course offerings.

Research Methodology

CE&O markets the web-based training program using a variety of methods including, announcements via *EO Update* (an electronic newsletter with information for tax-exempt organizations and tax practitioners who represent them); a prominent link on the Charities and Non-Profits page of irs.gov; and asking stakeholders (trade associations, practitioner groups, etc.) to send their members a link to the site. The contractor purchased the URL “stayexempt.org,” and houses the training there. Thus, we can advertise the URL and users can go directly to the product without going to irs.gov first.

After completing each module, the user can elect to complete a survey. We estimate that based on the number of participants that chose to complete the survey in 2008 and 2009, and because we are adding survey capability to the mini-courses, approximately 6,000 users per year will elect to complete the survey. Approximately 125,000 unique users visit the site each year so if 6,000 elect to complete the survey that’s a response rate of 5%. 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 the needs related to services provided by the IRS.

Based on the success of the training so far, and because we plan to maintain the training as-is for several more years, this clearance package covers the period of January 2010 – December 2011. The contractor will continue to provide monthly reports on overall website usage and survey results. We will evaluate the survey results and make any necessary improvements to the training program.

Tallies and Other Information

The following information is needed to satisfy OMB clearance requirements. It must be provided within 60 days after survey data collection operations or focus group interviews are concluded:

1. FINDINGS: Provide a brief summary of significant (important) findings that were evidenced in the results.
2. ACTIONS TAKEN OR LESSONS LEARNED: Provide a brief summary of any actions taken or lessons learned as a result of the findings.
3. TAXPAYER PARTICIPATION:
 - a. SURVEYS:
 - i. Number of requests for taxpayer participation
 - ii. Number of questionnaires returned or interviews completed
4. DATE THE DATA COLLECTION BEGAN
5. DATE THE DATA COLLECTION ENDED
6. COST: Include printing, postage, travel, overtime payments, payments to vendors, and any other costs incurred as a direct result of the survey (do not include regular salaries of IRS employees).

Estimated Burden Hours

The IRS estimates that approximately 6,000 users annually will complete an online survey for one of the interactive modules or mini-courses. Only the burden of those customers completing the survey is calculated below since the amount of time required to refuse the survey is minimal.

(6,000 participants X 5 minutes per completed survey = 30,000 minutes = 500 hours annually)

Estimated Cost

The cost of this study will run approximately \$25,700 annually. The cost covers survey development, administration, analysis, and reporting. For CY10 and CY11, the cost will run approximately \$51,400.

Participant Privacy and Anonymity

The IRS will ensure compliance with the Taxpayer Bill of Rights II. All participants will be treated fairly and appropriately. The security of the data collected and the privacy of the participants will be safeguarded at all times. A privacy page (see below) on the external website housing the training provides security and privacy policy disclaimers and explanations. The information on this page ensures participants that the survey is anonymous and does not require the participant to provide any personal information. It explains that the participant's feedback will be available only to the IRS and the third-party involved in the development of this training and IRS will use the feedback to improve future training. The external website that houses the training will record the users IP address, operating system, Web browser, and, if applicable, the URL from which the user linked to the training for purposes of analyzing traffic, but the contractor will not pass this information to the IRS.

The paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the: **IRS Tax Products Coordinating Committee, Western Area Distribution Center, Rancho Cordova, CA 95743-0001.**

Privacy Statement

[Banner](#)

[IRS Seal](#)

Your privacy is important to us. While this website does not ask for or collect any information that personally identifies you, it does collect other technical data which are outlined below.

For your confidence, this Privacy Statement answers the following questions:

1. [What information is collected through this website?](#) [\[Link to question 1, page 1, below\]](#)
2. [What organization is collecting the information?](#) [\[Link to question 2, page 2, below\]](#)
3. [How is the information used?](#) [\[Link to question 3, page 2, below\]](#)
4. [With whom may the information be shared?](#) [\[Link to question 4, page 2, below\]](#)
5. [What choices are available to you regarding the collection of information?](#) [\[Link to question 5, page 2, below\]](#)
6. [What security procedures are in place to protect against the loss, misuse, or alteration of information?](#) [\[Link to question 6, page 2, below\]](#)

1. What information is collected through this website?

This website can collect two types of information:

- A. Technical information about your computer
- B. Anonymous feedback regarding your satisfaction with the training

A. Technical information about your computer

The courses on this site feature interactive games that require Macromedia Flash Player. A software detector will be used to determine if your computer has Flash Player installed. If Flash is not detected on your computer, a prompt to download and install will be provided.

All technical information is destroyed immediately when you leave the website or close the browser.

This site also records your IP address, your operating system, your Web browser, and the URL from which you linked here (if that is provided by your Web browser). The information is compiled and used to analyze traffic but does not allow the IRS to identify you personally.

B. Anonymous feedback regarding your satisfaction with the training

At the end of each course, you will be asked to complete a brief evaluation survey. Since you take all training anonymously, you will not be asked for any identifying data. You will simply be asked to provide your opinion in response to a series of course-related questions.

2. What organization is collecting the information?

The anonymous feedback you provide in the course surveys will be received by the IRS office of Exempt Organizations and may be shared with the third-party organization that partnered in developing this computer-based training course.

3. How is the information used?

Your feedback will be used to help refine future training efforts by the IRS office of Exempt Organizations.

4. With whom may the information be shared?

The IRS office of Exempt Organizations may share your course feedback with the third-party organization involved in the development of this computer-based training course. Beyond this, your feedback will not be shared with any other third-party individual or organization.

5. What choices are available to you regarding the collection of information?

If you would prefer that the website does not run the Flash detector, simply:

- Go to “Tools” in your Web browser’s toolbar
- Select “Internet Options”
- Select the “Security” tab in the “Internet Options” window
- Click the “Custom level” button on the bottom of the window
- Scroll down to “Run ActiveX controls and plug-ins” on the menu of options and set it to “disable”
- Scroll down farther to “Active scripting” and set it to “disable”
- Click “OK” to exit the “Security Settings” window
- Click “OK” to exit the “Internet Options” window
- Restart your browser and return to www.stayexempt.org

6. What security procedures are in place to protect against the loss, misuse, or alteration of information?

In accordance with the Federal Information Security Management Act (FISMA), this website follows the guidelines of the [National Institute of Standards and Technology \(NIST\)](http://www.nist.org). [\[Link to http://www.nist.org\]](http://www.nist.org)

As a result, this website employs a combination of powerful password encryption and firewalls that are continually tested and upgraded—effectively eliminating threats to the host server or the website.

Study Contact

For questions regarding the study, contact:

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