

Supporting Statement
Approval Request to Conduct Customer Satisfaction Research (OMB #1545-1432)
TE/GE Examination and Determination Mail Surveys

A. JUSTIFICATION

1. Circumstances Making the Collection of Information Necessary

This package is a continuation of the same survey approved under CS-06-016, CS-07-071 and CS-09-199. The changes with the survey this year and next include less cost and less burden hours. The estimated burden hours are lower due to the actual number of burden hours in 2011.

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, in 2007 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 could 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. In 2010, CE&O launched a redesigned version of the web site that permitted more efficient navigation of the site and added 15 new mini-courses. This year, CE&O added an additional 4 mini-courses. The survey option is offered to users of the 19 mini-courses as well as the original five modules. The same survey is used for all of the twenty-four course offerings. The survey results provide CE&O with valuable feedback that allows them to improve future training.

2. Purpose and Use of the Information Collection

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 2010 and 2011, approximately 3,600 users per year will elect to complete the survey. Approximately 4,400 unique users navigated to the survey after completion of the training module, so if 3,600 elect to complete the

survey that's a response rate of 82%. 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 2012 – December 2013. 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.

3. Consideration Given to Information Technology

TE/GE is making full use of technology by offering more and more web-based trainings to assist more and more customers better understand their tax obligation. The survey is also web-based and is offered at the completion of each training.

4. Duplication of Information

This survey will provide valuable information that is not available in any internal IRS data source.

5. Reducing the Burden on Small Entities

NA

6. Consequences of Not Conducting Collection

Without this survey, TE/GE will not have the feedback necessary to enhance current trainings and develop new trainings around the customers' needs.

7. Special Circumstances

There are no special circumstances. The information collected will be voluntary and will not be used for statistical purposes.

8. Consultations with Persons Outside the Agency

NA

9. Payment or Gift

TE/GE will not provide payment or other forms of remuneration to respondents.

10. Confidentiality

No PII will be collected during the survey.

11. Sensitive Nature

No questions will be asked that are of a personal or sensitive nature.

12. Burden of Information Collection

The estimated time to complete the survey is five minutes. Assuming an 82 percent response rate (7200), the total annual burden hours requested (600 hrs) are based on the number of respondents we expect to complete the survey over the requested period for this clearance (January 1, 2012 through December 31, 2013). Only the burden of those customers completing the survey is calculated below since the amount of time required to not navigate to the survey is zero.

13. Costs to Respondents

No costs are anticipated.

14. Costs to Federal Government

\$4,000

15. Reason for Change

Not applicable.

16. Tabulation of Results, Schedule, Analysis Plans

Feedback collected provides useful information, but it does not yield data that can be generalized to the overall population. Findings will be used for general service improvement, but are not for publication or other public release.

Although TE/GE does not intend to publish its findings, TE/GE may receive requests to release the information (e.g., congressional inquiry, Freedom of Information Act requests). TE/GE will disseminate the findings when appropriate, strictly following IRS' "Guidelines for Ensuring the Quality of Information Disseminated to the Public.", and will include specific discussion of the limitation of the qualitative results discussed above.

17. Display of OMB Approval Date

We are requesting no exemption.

18. Exceptions to Certification for Paperwork Reduction Act Submissions

These activities comply with the requirements in 5 CFR 1320.9.

B. STATISTICAL METHODS

The primary purpose of these collections will be for internal management purposes; there are no plans to publish or otherwise release this information.

1. Universe and Respondent Selection

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 trainings there. After completing each training, the user can elect to complete the survey.

2. Procedures for Collecting Information

The contractor purchased the URL “stayexempt.org,” and houses the trainings there. After completing each training, the user can elect to complete the survey.

3. Methods to Maximize Response

At the completion of the training, all users are asked to complete the survey.

4. Testing of Procedures

N/A

5. Contacts for Statistical Aspects and Data Collection

Michelle Pendzick in the Strategy & Planning Office, TE/GE manages all of the customer satisfaction survey. Michelle may be contacted at 202-683-9195 or by email at michelle.penzick@irs.gov.