

## **Attachments**

Focus Groups Sign-up  
Phone Focus Group Screeners  
Focus Group Confirmation Letter  
Moderator's Guides



## THE IRS NEEDS YOUR HELP \$50 FOR YOUR PARTICIPATION

We are looking for taxpayers who are willing to help with a research study. The study involves participating in a one-hour phone discussion on **Wednesday, May 8, 2013 at Noon Eastern**. A toll-free telephone number will be provided for the call.

The meeting will include about 6 taxpayers and will be led by a professional moderator, contracted by the IRS. You will be asked to share your experience about your visit to this IRS office. You will not be asked about your tax situation and your identifying information will not be shared in the results. Taxpayers will receive \$50 for their participation in the one-hour call.

If you are interested, please write your name and telephone number on the sign-up sheet. Please note that participants are selected randomly from the list, so not all names will be contacted.

NAME	Telephone Number
	(   )
	(   )
	(   )
	(   )
	(   )
	(   )



**IRS W&I Field Assistance  
Phone Focus Group Recruiting Guide and Reminder  
April 2013**

*[Recruiters: recruit 6 participants for each focus group session]*

**INITIAL CALL**

Hello, I'm \_\_\_\_\_ and I'm calling from \_\_\_\_\_. You recently visited a local IRS office and indicated you would be interested in participating in a research study. We are calling to set-up this one-hour focus group call for the study. This is NOT a call about your specific case. Participation in the focus group will give you an opportunity to tell the IRS about your service experiences and the group can share their ideas for service improvements.

Your participation in this research is voluntary, but your help on this project would be very much appreciated. As a token of our appreciation for your time, you will receive \$50. Are you interested in participating? *[If no, thank taxpayer for their time, and hang up]*

The focus group will be held via telephone on Wednesday, May 8 at Noon Eastern/3 PM Eastern/6 PM Eastern. All participants will call a toll-free 800 number to join the conference call. The discussion will last about one hour. You will be joined by a group of about six people who, like you, recently visited a local IRS office. You will not be asked about your specific tax situation, only about your experience with this process. Would you be able to participate? *[If no, thank them and terminate the call].*

1. Our records indicate that you received assistance from an IRS office. Is this correct?

\_\_\_\_\_ Yes *[Continue]*

\_\_\_\_\_ No - We are looking to speak with taxpayers who recently visited a local IRS office. Thank you. *[Thank and end call]*

2. Are you or is anyone in your immediate family an employee of the IRS?

\_\_\_\_\_ Yes *[explain, thank, then terminate the call]*

\_\_\_\_\_ No

3. *[Recruiter: note male or female]*

\_\_\_\_\_ Male

\_\_\_\_\_ Female

4. [Recruiter: note TAC location]

LIST OF PARTICIPATING IRS TAC LOCATIONS WILL BE PROVIDED

The dial in number is: XXXXXX

The access code is: XXXXX (Noon EST)

XXXXX (3pm EST)

XXXXX (6pm EST)

Do you have any questions? We would like some contact information to confirm the meeting and to mail out the token of appreciation for your participation.

Respondent Name \_\_\_\_\_

Respondent Address \_\_\_\_\_

We would also like to give you a reminder call on the day of the group. Would we reach you at this number or another? [record number \_\_\_\_\_]

The Paperwork Reduction Act requires that IRS provide an OMB Control Number on all approved public information requests. That number is OMB 1545-1349. Also, if you like, I can give you an address where you can send comments and questions regarding this process or suggestions for making it simpler.

READ ONLY IF RESPONDENT ASKS FOR ADDRESS: Send your comments and suggestions to:

Internal Revenue Service,  
Tax Products Coordinating Committee,  
Room #IR-6406  
1111 Constitution Ave. NW  
Washington, DC 20224

Thank you and have a nice day. We look forward to speaking with you on:

- Wednesday, May 8 at Noon Eastern
- Wednesday, May 8 at 3pm Eastern
- Wednesday, May 8 at 6pm Eastern

For record keeping:

\_\_\_\_\_ Confirmation letter mailed or faxed

\_\_\_\_\_ Reminder call made

**REMINDER CALL**

Hello, I'm \_\_\_\_\_ and I'm calling from \_\_\_\_\_. This is a call to remind you of your participation in the telephone focus group scheduled for (DATE AND TIME). The dial in number is: XXX-XXX-XXXX. The access code is: XXXX#. Do you have any questions? (PAUSE AND ANSWER QUESTIONS). Thank you in advance for your participation.

**W&I Field Assistance 2013 - Phone Focus Groups Confirmation Letter**

[DATE]

Thank you for your willingness to participate in a one-hour phone focus group interview of taxpayers to better understand the service you received and your service needs. This is NOT a call about your specific case. This is your opportunity to have input and to tell the IRS what your experiences have been and to make recommendations for change.

Your participation with this research is voluntary, but your help on this project would be very much appreciated. As a token of our appreciation for your time, you will receive \$50.

The focus group will be held by telephone on DAY DATE at (STATE TIME FOR EACH TAXPAYER: TIMES Eastern Time). All participants will call in to a toll-free number to join the conference call. The discussion will last about one hour. You will be joined by a group of up to 6 people who, like you, have experience with the IRS's process. You will not be asked about your specific tax situation, only about your experience with this process.

We are delighted that you will participate in our group.

The dial in number is: XXX-XXX-XXXX

The access code is: XXXX#

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 1545-1359. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, you may write to the IRS.

Send your comments and suggestions to:

**Internal Revenue Service,  
Tax Products Coordinating Committee,**

**Room #IR-6406  
1111 Constitution Ave. NW  
Washington, DC 20224**

Thank you and have a nice day. We look forward to speaking with you on: (STATE APPROPRIATE DATE AND TIME FOR TAXPAYER)

**IRS W&I Field Assistance  
Phone Focus Group Moderator's Guide  
May 8, 2013**  
*(Notes to the moderator are in italics)*

**Overview**

Hello, I'm [MODERATOR'S NAME] from Pacific Consulting Group. I will moderate our discussion today. The topic we'll be discussing is your experience with the IRS office you visited recently and your feelings about the service you received. The overall goal of the research is to provide information that will help the IRS provide better service to customers like you. Specifically, we are working with the IRS to make changes to their offices. Your input is very important for establishing the areas of the process that need improvement. This is your opportunity to have input and to tell the IRS what your experiences have been and to make recommendations for change.

First, I would like to thank all of you for calling in today. Our discussion will take about one hour. We would like to know your real attitudes and feelings, so please be as open and frank with us as you can. We would like for you to think about your opinions of the IRS with regard to your interactions with them and not your opinions regarding tax laws specifically. We are recording this session, and we have some IRS personnel listening in with us, but please keep in mind that our focus here is on your experiences and opinions, not on your individual identities.

**Introductions**

*[Moderator: Gather responses in a roundtable fashion]*

To get started, let's introduce ourselves. Please tell us your first name and the IRS office that you visited

**Experience at Local IRS Office (Reason for Visit, First Time vs. Multiple Visits, Issue Resolution)**

First, I'd like to ask each of you some questions about your visit to the local IRS office.

*[Moderator: Roundtable]*

- Which local IRS office did you visit most recently?
- What was your main reason for visiting the IRS office?
- Was this the first time you visited an IRS office or have you visited an IRS office before?
  - *[If not first visit]* How many times have you visited an IRS office within the past 2 years?
- Did the IRS representative resolve your issue or provide you with the assistance you needed to resolve your issue?
- *[If not]* Did the assistor need additional help from another IRS employee?
- Did you have to contact the IRS office again to resolve your issue?
- What could have been done to resolve your issue more quickly?

*[Moderator: Open Discussion]*

Now, I'd like to open this up to the group.

- For those of you who have visited the office frequently, can you please tell me why you've gone more than once?
  - Probes: follow up for same issue, multiple issues, preferred method of service, unaware of other services
- What could have been done to minimize the number of visits to resolve your issue?

### **IRS Services**

*[Moderator: Group discussion]* Next, I'd like to talk about other ways to receive service from the IRS besides going to local IRS offices. This next set of questions is open to the group.

- What prompted you to come for service at the IRS office instead of using a different IRS service such as the IRS website, IRS toll-free phone line, mail or email?
- Before today, have any of you called the IRS's toll free phone line to get assistance with an issue?
- Would you call the IRS's toll free phone line again to get assistance again in the future?
  - If not please explain why?
- What could IRS do to improve the IRS toll-free phone line to encourage you to call IRS instead of going into an IRS office?
- Before today, have any of you emailed IRS to get assistance with an issue?
- Would you email IRS to get assistance again in the future?
  - If not, please explain why?
- What could IRS do to improve the email service to encourage you to email IRS instead of going into an IRS office?
- Before today, have any of you mailed IRS a letter to get assistance with an issue?
- Would you mail IRS a letter again to get assistance again in the future?
  - If not, please explain why?
- What could IRS do to improve the IRS mail service to encourage you to mail a letter to the IRS to resolve your issue instead of going into an IRS office?



Before we talk about IRS.gov, I'd like to know how frequently each of you uses computers or the Internet.

[Moderator: Roundtable]

- Do you have access to the Internet?
- How frequently do you use the Internet?
- What is your comfort level with using computers?
  
- Before today, have you visited the IRS website at [www.irs.gov](http://www.irs.gov) to get assistance with an issue?
- Would you use the IRS website (www.irs.gov) to get assistance again in the future?
  - If not please explain why?
- What could IRS do to improve the IRS website to encourage you to visit the website to resolve your issue instead of going into an IRS office?

### **TAC Office Likes and Dislikes**

The last topic before we wrap up is to ask you what you like most and least about the IRS office that you visited most recently. [Moderator: Open Discussion]

- What do you like most about the IRS office you visited?
  - Probe: TAC staff, issue resolution, office location, building condition, wait time, privacy, security/screening, hours of operation, etc.
- What do you like least about the IRS office you visited?
  - Probe: wait time, privacy, security/screening, hours of operation, office location, building condition, issue resolution, TAC staff, etc.
- Based on your response to the last question, what could the IRS do to improve your experience at the IRS offices?

### **Overall Improvement**

- The last question I have is what additional suggestions do you have for the IRS regarding how they can serve you better?

### **Wrap Up**

- Those are all the questions that I have for this session. I want to thank you and the IRS wants to thank you, for participating in this discussion. PCG will be sending a \$50 token of our appreciation in the mail within two weeks.