

Request for Approval under the “Generic Clearance for the Collection of Routine Customer Feedback” (OMB Control Number: 1545-1432)

TITLE OF INFORMATION COLLECTION: FY 2023 STAKEHOLDER PARTNERSHIPS, EDUCATION, AND COMMUNICATION (SPEC) - VOLUNTEER EXPERIENCE SURVEY

PURPOSE:

The purpose of the survey is to gather feedback on two external performance measures: 1) SPEC Volunteer Satisfaction 2) SPEC Volunteer Dissatisfaction. As part of the agency’s and IRS emphasis on customer experience, the information will help identify areas for improvement to the VITA/TCE program to meet Partners’ and volunteers’ needs and enhance services to taxpayers. The contractor, Pacific Consulting Group (PCG), will administer annual online surveys of 1,000 volunteers, with a minimum quota of 200 IRS employees, to determine their level of satisfaction with the VITA/TCE program and identify areas for improvement. The survey consists of 46 non-demographic questions. Based on the selections made in question 1, respondents will be automatically branched to the respective follow-up questions. Each respondent will receive between 5 and 42 questions.

Volunteers are the backbone of the VITA/TCE program; they allow the IRS to serve taxpayers who might otherwise pay for tax preparation or make errors during self-preparation. The defining features of volunteerism as voluntary, sustained helpfulness suggests it may be productive to examine the motivations that lead individuals to seek VITA/TCE volunteer opportunities and to sustain VITA/TCE volunteerism from year to year. This research will add important quantitative information and provide a greater understanding of volunteer experiences with the VITA/TCE program and services.

- How do volunteers learn about the VITA/TCE program?
- How do volunteers rate their overall experience with using IRS.gov to sign up as a volunteer?
 - Were their questions answered during Orientation?
 - How do volunteers rate the training they receive?
 - Was the frequency of communications with the Community Partner or Site Coordinator appropriate or too infrequent?
 - How likely are volunteers to assist in the VITA/TCE program again?

DESCRIPTION OF RESPONDENTS:

Survey respondents will be recruited from the online VITA/TCE sign up form on IRS.gov. The vendor, PCG, will recruit respondents from a list of approximately 8,000 volunteers who indicated they were willing to be contacted regarding IRS research.

TYPE OF COLLECTION: (Check one)

- | | |
|--|--|
| <input type="checkbox"/> Customer Comment Card/Complaint Form | <input checked="" type="checkbox"/> Customer Satisfaction Survey |
| <input type="checkbox"/> Usability Testing (e.g., Website or Software) | <input type="checkbox"/> Small Discussion Group |
| <input type="checkbox"/> Focus Group | <input type="checkbox"/> Other: _____ |

CERTIFICATION:

I certify the following to be true:

1. The collection is voluntary.
2. The collection is low burden for respondents and low-cost for the Federal Government.
3. The collection is non-controversial and does not raise issues of concern to other federal agencies.
4. The results are not intended to be disseminated to the public.
5. Information gathered will not be used for the purpose of substantially informing influential policy decisions.
6. The collection is targeted to the solicitation of opinions from respondents who have experience with the program or may have experience with the program in the future.

Name: Chiquita Russaw

To assist review, please provide answers to the following question:

Personally Identifiable Information:

1. Is personally identifiable information (PII) collected? Yes No
2. If Yes, is the information that will be collected included in records that are subject to the Privacy Act of 1974? Yes No
3. If Applicable, has a System or Records Notice been published? Yes No

Gifts or Payments:

Is an incentive (e.g., money or reimbursement of expenses, token of appreciation) provided to participants? Yes No

BURDEN HOURS

Survey respondents will be recruited from the online VITA/TCE sign up form on IRS.gov. The vendor, PCG, will recruit respondents from a list of approximately 8,000 volunteers who indicated they were willing to be contacted regarding IRS research. To determine eligibility for the survey, potential respondents will complete a screening form, which should take approximately one minute to finish. Following screening the total expected participants is 1,000 respondents including 200 IRS employees. The participants total burden estimate is 15 minutes and includes projected times to: read correspondence (initial solicitation, confirmation, and reminder emails), complete the screening form (for interested respondents), and participate in the survey.

Category of Respondent	No. of Respondents	Participation Time (in minutes)	Burden (in Hours)
Non-participant	7000	1	116.7

Expected participant	1000	15	250.0
Totals	8000		366.7

Estimated Response Rate: 12.5%

Total Burden Estimate: 366.7 hours

FEDERAL COST:

Estimated annual cost for the contractor to administer the STAKEHOLDER PARTNERSHPS, EDUCATION, AND COMMUNICATION (SPEC) - VOLUNTEER EXPERIENCE SURVEY is \$66,020.

STATISTICAL METHOD:

If you are conducting a focus group, survey, or plan to employ statistical methods, please provide answers to the following questions:

The selection of your targeted respondents

1. Do you have a customer list or something similar that defines the universe of potential respondents and do you have a sampling plan for selecting from this universe?
 Yes No

If the answer is yes, please provide a description of both below (or attach the sampling plan)? If the answer is no, please provide a description of how you plan to identify your potential group of respondents and how you will select them?

Participants are selected from an existing database of volunteers who signed up and provided an email address on IRS.gov (<https://www.irs.gov/individuals/irs-tax-volunteers>) to volunteer with the VITA/TCE Program and agreed to take the survey. A mixture of participants from each state, Puerto Rico, Guam, and the U.S. Virgin Islands are selected randomly to ensure equitable representation. Information is collected onto an Excel spreadsheet and a random number is assigned to each record. The file is then sorted by state and random number. To ensure adequate and diverse sampling, the pre-determined number of participants from each state or territory is selected and added to a second Excel spreadsheet from which volunteers are sent opt-in emails. If they agree to participate, they will be sent email invitations with a link to access the survey.

Administration of the Instrument

1. How will you collect the information? (Check all that apply)
 - Web-based or other forms of Social Media
 - Telephone
 - In-person
 - Mail
 - Other, Explain – Microsoft TEAMS or ZOOM for sharing visuals.
2. Will interviewers or facilitators be used? Yes No

Please make sure that all instruments, instructions, and scripts are submitted with the request.

Instructions for completing Request for Approval under the “Generic Clearance for the Collection of Routine Customer Feedback”

TITLE OF INFORMATION COLLECTION: Provide the name of the collection that is the subject of the request. (e.g. Comment card for soliciting feedback on xxxx)

PURPOSE: Provide a brief description of the purpose of this collection and how it will be used. If this is part of a larger study or effort, please include this in your explanation.

DESCRIPTION OF RESPONDENTS: Provide a brief description of the targeted group or groups for this collection of information. These groups must have experience with the program.

TYPE OF COLLECTION: Check one box. If you are requesting approval of other instruments under the generic, you must complete a form for each instrument.

CERTIFICATION: Please read the certification carefully. If you incorrectly certify, the collection will be returned as improperly submitted or it will be disapproved.

Personally Identifiable Information: Provide answers to the questions.

Gifts or Payments: If you answer yes to the question, please describe the incentive and provide a justification for the amount.

BURDEN HOURS:

Category of Respondents: Identify who you expect the respondents to be in terms of the following categories: (1) Individuals or Households; (2) Private Sector; (3) State, local, or tribal governments; or (4) Federal Government. Only one type of respondent can be selected.

No. of Respondents: Provide an estimate of the Number of respondents.

Participation Time: Provide an estimate of the amount of time required for a respondent to participate (e.g., fill out a survey or participate in a focus group)

Burden: Provide the Annual burden hours: Multiply the Number of responses and the participation time and divide by 60.

FEDERAL COST: Provide an estimate of the annual cost to the Federal government.

If you are conducting a focus group, survey, or plan to employ statistical methods, please provide answers to the following questions:

The selection of your targeted respondents. Please provide a description of how you plan to identify your potential group of respondents and how you will select them. If the answer is yes, to the first question, you may provide the sampling plan in an attachment.

Administration of the Instrument: Identify how the information will be collected. More than one box may be checked. Indicate whether there will be interviewers (e.g., for surveys) or facilitators (e.g., for focus groups) used.