

Request for Approval under the “IRS Generic Clearances for Customer Satisfaction” (OMB Control Number: 1545-1432)

TITLE OF INFORMATION COLLECTION: FY 2024 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 Volunteer Income Tax Assistance/Tax Counseling for the Elderly (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 approximately 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.

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:

Participants are selected from an existing database of potential 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.

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: Jeffery McConnell

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 6,000 potential 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. The 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. An estimated 5,000 confirmations including 500 IRS employees will result in approximately 1,000 actual respondents including 200 IRS employees due to drop offs and schedule conflicts.

Category of Respondent	No. of Respondents	Participation Time (in minutes)	Burden (in Hours)
Non-respondent	6,000	1	100
Expected respondent	1,000	15	250
Totals	7,000		350

Estimated Response Rate: 17%

Total Burden Estimate: 350 hours

FEDERAL COST:

Estimated annual cost for the contractor to administer the STAKEHOLDER PARTNERSHIPS, EDUCATION, AND COMMUNICATION (SPEC) - VOLUNTEER EXPERIENCE SURVEY is \$100,228.

JUSTIFICATION REQUEST FOR EXEMPTION TO USE RACE AND ETHNICITY QUESTION WITH MINIMUM CATEGORIES ONLY

The default race and ethnicity questions minimum categories, multiple details or minimum categories only with examples for this survey poses additional burdens to SPEC, TSSS Research, and the contractor. We respectfully request to use the race and ethnicity question with minimum categories only and have listed the burdens associated with default categories:

- Increases privacy and confidentiality risks due to the small sample size of VITA/TCE volunteers who agree to take the survey. Using the expanded category responses would deanonymize the survey.
- Due to increased contractor time and cost for the survey development, IRS is unable to implement the expanding response list at this time.
- Increases TSSS Research time to program statistical analysis software to conduct data analytics and validate contractor's dataset, findings, and reports while ensuring no personally identifiable information is included.

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?

[X] 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 randomly selected 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.