

## **Recommendations for Innovative Outreach to IRS Stakeholders** **By the Taxpayer Advocacy Panel (TAP)**

As Chair of the Taxpayer Advocacy Panel (TAP), I would like to thank Chairman Cherecwich and the IRS Oversight Board for the opportunity to discuss recommendations for more effective outreach by the IRS to its Stakeholder partners.

The Taxpayer Advocacy Panel is a nation-wide organization of approximately 100 citizen volunteers appointed by the United States Treasury Department for three year terms. The TAP constituency consists of individual taxpayers and small business owners. TAP is a Federal Advisory Committee.

The TAP mission is to:

- Listen to taxpayers.
- Identify individual taxpayer and small business issues.
- Make recommendations to the IRS to address these issues in order to improve service and achieve greater taxpayer satisfaction.

### **TAP Outreach Initiatives**

TAP uses outreach in a variety of ways to communicate with taxpayers and small business owners throughout the United States. The purpose of this outreach is two-fold: to seek taxpayer input on issues affecting IRS customer service and satisfaction and to publicize TAP. Key examples of TAP outreach include:

- Organizing Town Hall meetings (3 to 6 per year) held primarily during the tax season. TAP teams with the Taxpayer Advocate Service and the National Taxpayer Advocate (Nina Olson) in these meetings which consist of short presentations followed by focus group discussions to identify taxpayer issues.
- Arranging individual TAP member outreach presentations to religious and civic groups, to professional organizations, and to small business organizations. The TAP outreach program includes a time segment to allow members of these organizations to document impediments and to identify improvement opportunities with the goal of enabling members of these organizations to meet their IRS obligations more efficiently.
- Initiating public media interviews, news releases, flyers, and other publications to educate the public about the Taxpayer Advocacy Panel and to seek taxpayer input.
- Meeting with representatives of Local, State, and Federal elected officials to communicate the TAP mission and organizational objectives.
- Teaming with the IRS SPEC (Stakeholder Partnership, Education and Communication) and TAS (Taxpayer Advocate Service) organizations at educational events (including nation-wide tax forums, tax practitioner seminars, and continuing education courses) to publicize TAP and seek taxpayer input.
- Working with the IRS to include TAP contact information in various IRS publications and on the IRS web site. TAP has also developed a poster which is displayed in the Taxpayer Assistance Centers. This poster provides information about TAP, including the web site and a phone number, where the taxpayer can provide feedback.

These outreach initiatives are a primary source of input to the Taxpayer Advocacy Panel and have led to the development of a significant number of IRS improvement opportunities. In 2006,

58 recommendations were forwarded to the IRS, and in 2007, 54 recommendations were forwarded.

### Example TAP Recommendations Implemented by the IRS

A sample of recent successes in working with the IRS includes:

- Improvements in the process to request an extension of time to file a tax return including a longer initial period and the need to file only one form.
- Improved and clearer notices sent to taxpayers.
- Improved training materials for the IRS-sponsored Volunteer Return Preparation Program (VITA, AARP/TCE, other coalitions).
- Preparation of a marketing kit to encourage tax preparation professionals to electronically file returns instead of sending the paper copy of the return to the taxpayer to sign and then mail.
- Taxpayer Assistance Center (TAC) surveys of the taxpayers and of TAC employees to identify key taxpayer expectations and develop improvement opportunities for the TAC facilities.

### Outreach Toolkit Developed by TAP

A committee of Panel volunteers and IRS personnel manage and continuously improve the Taxpayer Advocacy Panel Outreach Toolkit. Typically, about 35 citizen volunteers, 1/3<sup>rd</sup> of the Panel, are new volunteers each year. The Outreach Toolkit was developed to train the new Panel members and jump start their individual outreach initiatives.

The Outreach Toolkit includes the following materials:

- Taxpayer Advocacy Panel introductory material.
- PowerPoint presentation introducing TAP and how it can serve the individual taxpayer.
- Outline of recommended talking points for an informal presentation.
- Variety of products and materials to hand out at outreach events. These handouts educate the public about TAP and its mission.
- Sample letter and telephone script for making contact with organizations to propose an outreach activity.
- Sample news release to send to the local media announcing the selection of a new TAP member.
- Taxpayer outreach feedback form used at outreach events to encourage taxpayers to document issues and concerns which they experience with income tax compliance.
- Tri-fold document summarizing the TAP mission and background plus information on how the individual taxpayer can contact TAP either by phone or at the TAP website ([www.improveirs.org](http://www.improveirs.org)).
- Pocket guide for TAP panel members documenting talking points and successful outreach practices for TAP volunteers. A portion of this pocket guide containing TAP information can be detached and given to the audience.
- A list of recent TAP success stories which can be used as examples of the TAP issues and recommendations which have been elevated and accepted by the IRS. This list is periodically updated to include recent success initiatives.

In addition to the toolkit, TAP works closely with IRS organizations that have their own outreach initiatives including the TAS and SPEC organizations. These ongoing initiatives are great opportunities for TAP to team with IRS-sponsored programs.

## Opportunities for the IRS to Add Further Value to Stakeholder Partners

The IRS Stakeholder partners offer a great opportunity for the IRS to leverage IRS resources in order to work toward the major IRS objective of achieving full tax compliance in an orderly, efficient, and customer-friendly environment. Many Stakeholder partners have limited resources and depend heavily on volunteers. The IRS has an opportunity to increase the efficiency and effectiveness of these organizations by creating resources, products, and communications that can be generally applied by the Stakeholder partners.

Example opportunities include:

- Create a website on IRS.gov for IRS Stakeholder partner organizations that support individual taxpayers. Also, enhance the Stakeholder website of the Small Business/Self Employed (SB/SE) Division for IRS partner organizations that support the SB/SE community.
- Develop a suite of communication and information products that can be used by the various partner organizations and post them on the IRS.gov Stakeholder websites.
- Survey the current suite of outreach products and programs used by the various Stakeholder organizations and the IRS itself including the Taxpayer Advocate Service. Identify the best products and include them on the IRS Stakeholder web sites.
- Work with the Stakeholder partners to develop a branding and publicity strategy for each of the Stakeholder organizations to enhance the public awareness of these valuable public service organizations.
- Improve IRS employee awareness of Stakeholder partner activities via internal IRS communications to document the opportunity they offer to the IRS in achieving the IRS mission.
- The IRS tax code and the associated publications and forms are complicated and appear to be above the capabilities of the average taxpayer to complete their tax forms and meet their tax obligations without expert help. Assuming the Stakeholder partner will prepare the tax return for the taxpayer, can a comprehensive checklist be prepared and be made available to the taxpayer prior to his visit to the Stakeholder's facilities. This would help to ensure that the taxpayers have all of the necessary material to have their tax returns prepared? The SPEC Intake Sheet, Form 13614, can be used as a starting point.
- Most taxpayers have a fear that they only hear from the IRS when there is a problem with their tax return. Can communication opportunities be developed between the IRS and the taxpaying public to get the message out of what is the obligation of the individual taxpayer, what is new, what are the most common credits not being taken by taxpayers, and how the money is used by the Federal Government? This information is available in a variety of sources. Unfortunately, the average taxpayer is unaware of much of this information. Two key calendar points for communications with the taxpayer are: the start of the tax season, and when the refund is sent or the final tax payment is received. In addition to direct communication between the IRS and the individual taxpayer, the Stakeholder organizations can support this public education initiative. (Note, both Social Security and Medicare have annual written communications to their customer base.)
- The filing of an Income Tax return is one part of the overall Financial Literacy initiative that some IRS Stakeholder partners are addressing. Can a common suite of Financial Literacy programs and products be prepared in cooperation with Stakeholders and published on the IRS web site for common usage and leveraging?

## Measuring Outreach to Stakeholders

The first step in developing efficiency and effectiveness measures is to agree on the key objectives of the IRS Stakeholder Program. Developing key objectives should be a team effort and might include:

- Develop tools and products to increase capabilities of the Stakeholder programs.
- Achieve accurate and electronically filed tax returns.
- Increase taxpayer satisfaction with the IRS in meeting income tax requirements.
- Address taxpayer questions and concerns promptly and with a minimum time requirement by the taxpayer.

The second step is to develop quantitative measures to monitor IRS resource utilization and the effectiveness of these resources. This should also be a team effort. These measures might include:

- Measures that compare IRS resources and funding applied to supporting the Stakeholders (and the taxpayers using the Stakeholders) compared to IRS resource allocation overall.
- Number of tax returns prepared (and filed) by the Stakeholder partners. Number electronically filed. Number that had errors. Identification of major sources of error. And progress in reducing the major error categories over time.
- Definition of major taxpayer expectation categories and measurement of progress in these areas. This might need to be done by a sample survey of taxpayers served by the Stakeholders.

Thank you again for the opportunity to participate in this forum to strengthen the IRS/Stakeholder relationship.

Henry A. Mosler  
Taxpayer Advocacy Panel Chairman, 2008  
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