



Taxpayer Assistance Blueprint (TAB)

In 2005, Congress requested the IRS develop a five-year plan for taxpayer service. The IRS implemented the Taxpayer Assistance Blueprint (TAB) project as a two-phase effort designed to answer questions about the service needs and preferences of individual taxpayers. The scope of the Blueprint includes taxpayers who file, or should file, any Form 1040, including self-employed taxpayers. All pre-filing, filing, or post-filing services were reviewed, with a few exceptions. The scope does not cover return processing procedures, compliance services, or the clarity of forms and publications.

Phase 1 of the Blueprint effort included significant stakeholder and employee engagement, as well as the initial stages of extensive research. The TAB Phase 1 Report outlined key strategic improvement themes, and was delivered to Congress in April 2006. Phase 2 built upon the foundation of Phase 1, including continued and extensive additional research, and resulted in the TAB Phase 2 Report, which details the TAB Strategic Plan for taxpayer service over the next five years.

The importance and wide-ranging impact of the TAB Strategic Plan required that the TAB team take the time to get it right. The TAB Phase 2 Report was completed after careful analysis of a large body of research and a rigorous quality review process to ensure that conclusions and recommendations were supported by the data and agreed to by reviewers at Treasury and Office of Management and Budget. Due to the extensive internal oversight and collaboration during the TAB project, some recommendations contained in the final Blueprint were integrated into existing IRS cyclical processes, such as budgeting and strategic planning, prior to completion of the Report.

Key Messages

- The Blueprint was completed after careful analysis of a large body of research and a rigorous quality review process. Thanks to this research, the IRS now knows more than ever before about taxpayer needs, preferences, and behaviors.
- The IRS can reduce burden to taxpayers and partners by enhancing the efficiency and effectiveness of service delivery.
- TAB research, while extensive, is not all-inclusive. It does provide baselines and trends that provide insight into taxpayer needs, preferences, and behaviors. This insight ensures that service-related recommendations and decisions are based on data and stakeholder feedback.
- Data from the studies allows the IRS to continue incorporating taxpayer, partner, and government value in Service-wide strategic planning and budget processes.
- The TAB Strategic Plan recommends a balanced service portfolio for all taxpayers, including special populations (i.e., low income, disabled, Limited English Proficient, and elderly taxpayers).
- The TAB Strategic Plan includes a suite of service improvement initiatives, some of which have already been identified for implementation over the next two years. These initiatives address Web, Telephone, and Partner Services through the available service channels, as well as Outreach and Education and Marketing and Promotion of available service options.
- Improvement initiatives for Taxpayer Assistance Centers (TACs) address service delivery options and outline a research-based investment decision-making model.



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- The TAB Strategic Plan includes a set of recommended research studies to further refine the IRS' knowledge of taxpayer needs, preferences, and behaviors and to study other topics, including the impact of service on compliance and barriers to channel migration.

Background

The TAB team examined taxpayer behaviors and the extent to which taxpayers and partners use available channels and services. Other research included analysis of customer service leading practices to understand how top government agencies and private sector organizations deliver services. The team also analyzed internal compliance, cost, and performance databases. Using these initial research results, the team identified and developed research projects to quantify the services taxpayers and partners need from the IRS, as well as the service channels they prefer to use.

Thirty-nine separate research studies were conducted, but much of the increased understanding of taxpayer needs, preferences, and behaviors came directly from taxpayers through four major studies:

- The Taxpayer Customer Service and Channel Preference Survey (also called the Oversight Board Survey)
- The TAB Conjoint II Study
- The Opinion Survey of Taxpayer Resources and Services (also called TAB Benchmark survey)
- The 2006 W&I Market Segment Survey

Significant insights from these studies include:

- A majority of taxpayers surveyed who currently use IRS assistance indicated a willingness to use electronic services for various tasks in the future.
- Few customers visit TACs relative to other channels (e.g., IRS.gov, telephone), but some segments of the population would prefer to continue using TACs rather than migrating to other service channels.
- Taxpayers who use IRS services are most concerned with first contact resolution.
- Overall, nine in ten taxpayers who used the IRS Web site, telephone line, or TACs for service in 2005 reported that they would use the same channel again in the future.

The TAB team studied the full range of service options and made recommendations to maintain and enhance all IRS channels.

The team examined service delivery within TACs and designed a research-based TAC Investment decision-making model for future decisions about the most effective service delivery practices.

- The IRS will research a new service delivery option called Facilitated Self-assistance Model (FSM). TAC customers in 15 selected pilot locations will be offered the option to use self-assisted telephone or Web service in lieu of assisted service. End-user surveys will be used to evaluate the effectiveness of the FSM and the potential for further implementation.
- The decision-making model calls for an analysis of existing TAC locations. This analysis and implementation of the recommendations will be conducted in phases using a prioritized approach and 26 taxpayer and government value criteria. Analysis is underway and initial

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recommendations will be presented to the IRS services governance body for approval later in 2007.

The TAB report contains a series of measures designed to evaluate the effectiveness of IRS service delivery. The portfolio includes existing and modified IRS measures as well as new measures based on TAB research. The Blueprint defines broad, high-level Outcome Categories of Compliance, Taxpayer and Partner Value, and Government Value.

Next Steps

The implementation strategy for the TAB Strategic Plan, outlined in the TAB Phase 2 Report, will be employed.

- The IRS will continue to integrate TAB Strategic Plan recommendations into the annual planning and budgeting process. Four of the Strategic Plan initiatives and part of the Multi-year Research Portfolio have already been included for funding in the President's FY08 Budget Request.
- The TAB-recommended Multi-year Research Portfolio will allow the IRS to continue making service-related decisions grounded in data concerning taxpayer needs, preferences, and behaviors.
- An IRS services governance body and TAB Program Management Office will be responsible for facilitating implementation of TAB recommendations, monitoring future research, and coordinating with business units to formalize integrated service investment decision-making.
- The proposed new measures for compliance, taxpayer and partner value, and government value will be developed.
- Updates will be provided, and stakeholder and employee input solicited as the IRS moves forward to implement the recommendations.