

EXECUTIVE SUMMARY

The conclusions and recommendations presented in this report are based on observations and findings from TAC Project Committee member visits to local TACs and interviews with TAC managers and employees. Information was also received from IRS Program Owners as well as from the Internal Revenue Manual (IRM).

The purpose of the visits to the TACs was to gain a better understanding of the communication process and signage in the TACs, receive insight from TAC employees and managers who deal daily with taxpayers, and identify ways to improve the instructional and informational signs, thus, improving customer service and satisfaction in the TACs.

In order to assure consistency for TAC Project member visits and observations, the Committee developed a series of questions to present to the TAC managers. Also, we were presented with copies of the 19 “Approved Signs” in the IRM. These questions focused on whether or not the signage in the TACs accomplished their intended purpose, if the signs were readable, if the signs actually were read by the taxpayer, which signs were needed and which signs could be eliminated. TAC Committee members visited 26 TACs and interviewed TAC managers and employees in 15 states. All thirteen of the TAC Committee members were involved in the visits and observations.

Following the visits to the TACs, each member of the Committee wrote a report documenting his/her observations and listing answers to the standardized questions. These reports were emailed to the Committee members before the monthly teleconference. On the teleconference, each TAC member gave a verbal report, followed by a “Question and Answer” and discussion time. From these interviews with TAC managers and employees, which occurred across the country, we began to see a number of similarities pointing up flaws with TAC signage and weaknesses in the process of communicating information between the TAC employees and the taxpayer.

At the June, 2010, face-to-face meeting in Milwaukee, the TAC observations and written reports, which had been compiled into booklet form, were discussed in an attempt to identify processes that could improve the signage and the communication process in the TACs and, thus, improve customer service and satisfaction.

At the face-to-face meeting several conclusions became obvious:

1. Field Assistance (FA) management needs to develop a more unified message for each type of TAC. Message points for each type of TAC should consider both the size of the TAC and the location of the TAC. The form of communication (signage) presently in use does not seem to work well in all

TACs, ending with signs not being read and, in general, being ignored by the taxpayer.

2. FA management should eliminate unnecessary signs, review and make improvements to existing signs and identify additional necessary signs. Our observations noted a number of posted signs that are not perceived as critical to the taxpayer's visit to the TAC; signs that contain too many words; and, signs that do not draw the taxpayer's attention.
3. FA management should consider the use of alternative communication methods. FA management should begin a long range implementation of electronic media, enhanced web sites, talking posters, informational booklets, and kiosks.
4. FA management should strongly encourage full utilization of the Q-Matic or Q-Lite system. The lack of use and/or misuse of the Q System hinders FA management from properly allocating funding and directing resources toward appropriate staffing for the types of customer issues dealt with in the individual TAC.
5. FA management should improve management monitoring and control of message and require on-site visits of all TACs. Currently there is no assessment method to monitor IRS to taxpayer communication effectiveness within the TAC; nor, are there regular visits by FA senior management to the TACs to determine communication effectiveness.

From the conclusions, nine recommendations were developed and subcommittees were appointed to develop and write the specific recommendations. These recommendations were discussed and expanded in the monthly teleconferences and eventually approved by the TAC Committee. They are:

1. FA management should determine message point sets for each type of TAC.
2. FA management should eliminate unnecessary signs. More specifically, the following signs should be removed from the list of approved signs contained in IRM section 21.3.4.3.13: 10169 – In this Office, We Can, 10169SP – En Esta Oficina Podemos, 12426 – Insert Card Dollar Amounts for Documents 10169 and 10169SP, Publication 4053 – Your Civil Rights are Protected Poster, and Publication 4053SP – Sus Derechos Civiles Estan Protegidos. (Note: It is the TAC Committee's conclusion that the remaining 14 signs listed in IRM section 21.3.4.3.13 should be retained subject to recommendations made concerning content, format, and color.)
3. TAC managers should follow the established IRM Process for all signs displayed in the TACs and FA management should modify the IRM Process to provide a sign template(s) for use in creating interim short-term signs.

4. FA management should maximize the communication effect of each remaining Approved Sign through modification and standardization of the content, format, and color. As part of this, the TAC Committee recommends that FA management review the colors used in designing signs and consider the “Psychology of Color” in standardizing sign development and redesigning existing Approved Signs.
5. TAC signs should be displayed external to the building in which TACs are located where possible and access to information about TAC locations should be improved.
6. FA management should consider the use of alternative communication methods such as electronic media, enhanced web sites, talking posters, information booklets, and/or kiosks.
7. Each TAC Manager should utilize the Q-Matic or Q-Lite system to its full capacity at all times. Components of this are: mandatory education by all employees of the TAC, placement of the Q-Matic so that it can be seen immediately on entering the TAC, and regular monitoring by FA to establish compliance.
8. FA management should develop a taxpayer communication assessment process. Questions pertaining to signage and communication should be included with the FA Comment Card and questions regarding taxpayer communication effectiveness and overall signage should be included in future TAC customer satisfaction surveys.
9. FA management should be required to do on-site visits of all TACs on a recurring basis, and the completed checklist should be forwarded to the FA Area Director and FA headquarters staff.

The TAC Project Committee strongly recommends that FA management study and implement the basic philosophy contained in “Color Psychology and Marketing” referenced in this report, and use more effective color schemes in development of future signage in the TACs.

The above is a summary of the conclusions and recommendations developed by the TAC Project Committee, all of which are expanded in the Signs Report. These conclusions and recommendations address the signage and communication processes in the TACs. They are based on our interviews with TAC managers and TAC employees as well as our observations in over 26 TACs. We believe costs of implementation differ among the nine recommendations and that no significant costs should be incurred in implementing at least six of the recommendations. As we made clear in the report, given the current level of concern in this country over the increasing costs of government, we are well aware that both the costs and the

benefits of implementing these recommendations are important threshold considerations for FA management to evaluate.

We submit our nine recommendations to FA with the belief they will improve the signage and enhance the overall communication effectiveness in the TACs, and, thus, improve customer service and satisfaction.