OMB Package

User Research for Tax Professionals on the IRS.gov Website

Participatory Design

Introduction

During the past 5 years, the IRS.Gov website has doubled in traffic, seen a double digit increase in user satisfaction scores, and won numerous awards. With a 2006 average of 3.7 million pages viewed per day, peak usage of over 24 million page views on April 17, 2006, and a yearly volume of 1.3 billion, www.irs.gov is the most heavily used federal government website. Based upon this success, the IRS would like to enhance the website to include an even better user experience.

The Public Portal Branch, in partnership with the MITRE Corporation, is conducting an IRS-wide information modeling initiative to create enterprise standards for the structure, organization, and display of IRS.gov content. IRS is planning and procuring a new infrastructure and design for the public portal (IRS.gov website), including replacement of the content management system. The information modeling project directly supports these improvements and will provide requirements for the new content management system.

The Tax Professionals Information Modeling Team is working the Tax Professionals branch of the National Public Liaison (NPL) Division analyze its content, conduct research on customers, and develop requirements for the information model to support Tax Pros content on IRS.gov.

Background

In response to a Congressional directive, the IRS conducted a comprehensive review of its current portfolio of taxpayer services to create a Taxpayer Assistance Blueprint (TAB). The TAB team identified the need to improve the website. Implementation of the completed information model will enable content authors and administrators to more efficiently create, store and manage their content.

The information model will establish standard IRS.gov content types with a consistent terminology, structure, and approach to tagging and metadata. IRS.gov content managers will be able to reuse content and avoid redundancy. The model will capture necessary metadata to ensure proper storage and maintenance of content.

The Tax Professionals Information Modeling team is using a user-centered design approach to develop the information model. This approach emphasizes involving the users (stakeholders, internal, and external customers) throughout the design process.

The Tax Professionals Site has one of the major audience groups seeking information on IRS.gov, making them major stakeholders.

Objectives of Research

The Tax Professionals Information Modeling team is collecting customer input for use in redesigning and improving the Tax Professionals website on IRS.gov and Tax Professionals information products in general. The Tax Professionals website can be updated and managed more effectively if we understand better how our customers look for and use Tax Professionals information. The focus of this design session is on the organization, structure, and labeling of the website information to help users find what they are most likely to need from the Tax Professionals site.

Methodology

Each session is designed to take approximately 90 minutes. Sessions will consist of a minimum of six and maximum of eight tax practitioners. Testing will occur at the IRS Nationwide Tax Forums in:

- Las Vegas, NV
- San Diego, CA
- Orlando, FL
- New York, NY
- Dallas, TX
- Atlanta, GA

The Info Modeling team will collaborate on prototypes to be used in the design sessions.

Sample Design

- Sessions will consist of a minimum of six and maximum of eight tax practitioners.
- The facilitator will introduce the session to the participants and describe the process and desired input from the users: the IRS is looking for user participation in the redesign of IRS.gov. The focus of this design session is on the organization, structure, and labeling of the information to help users find what they are most likely to need from the Tax Professionals site.
- The facilitator will provide the users with the paper prototypes of pages and a set of questions to guide their evaluation of the pages based on 1) organization of content, 2) overall structure/layout design, and 3) navigation labels.
- Participants work in small groups of 3-4 to evaluate designs. They provide answers on the worksheets and mark up/make notes on the paper prototypes.
- Each group presents its findings, highlighting their proposed changes to the design.
- The group, led by the facilitator, discusses differences in design.
- A post-session debrief (after each session) is conducted to review note and summarize session.
- Additional analysis and modeling take place after all sessions are completed.

No personally identifiable information will be collected.

Data Collection Date

Research will be conducted at the IRS Nationwide Tax Forums:

- Las Vegas, NV; July 7, 2009
- San Diego, CA; July 14, 2009
- Orlando, FL; August 4, 2009
- New York, NY; August 25, 2009
- Dallas, TX; September 8, 2009
- Atlanta, GA; September 22, 2009

Data to be collected

The participatory design sessions will gather user opinion on organization, structure, and labeling of the information on key IRS.gov web pages. Participants will markup large paper mockups, and will discuss findings as a group. Markups will be collected, and comments will be recorded.

How data will be used

Data will be used to further develop the information model and contribute to the site redesign. All information collected is strictly for research, and will not be used to personally identify participants nor will it be shared for commercial purposes.

How data will be analyzed

Analysis of the data will be conducted by the Tax Professionals Information Modeling Team and the Public Portal Branch.

Who is conducting research?

The Public Portal Branch requests this research. The paper prototypes and facilitator information were developed by the Tax Professionals Information Modeling Team, including members of the Public Portal Branch, The design sessions will be facilitated by IRS facilitators from NPL and assisted by PPB staff

Role	Name(s)	Operating Division	Organization	Job Title/Role	Contact Information
Planner/ Coordinator	Hayley Mitton Edith Hughes	WI MITRE	ETARC:ID:PP	Project Lead Consultant	Hayley.Mitton@irs.gov 202-283-4848
Session Facilitator/ Stakeholders	Mark Kirbabas Anjali Garg	Communications & Liaison	NPL; Stakeholder Relationship Mgmt	Chief, Stakeholder Relationship Mgmt Branch Program Analyst	Mark.J.Kirbabas@irs.gov 202-622-4037 Anjali.Garg@irs.gov 202-622-1429
Observer/ Team Member	Tom Calhoun Beth Krappweis Cindy May	WI	ETARC:ID:PP	Sr Program Analyst IT Specialist Sr. Program Analyst	

- **Planner/Coordinator** – Ensures that all material is prepared and in place to allow the design sessions to take place as planned, and makes adjustments as required. This role is required before, during, and after the period in which the design sessions are scheduled.
- **Session Facilitator/Stakeholders** – Facilitator oversees the session itself, introduces and explains the session to participants, observes actions, and collects feedback. The facilitator ensures that participants have a productive and successful experience. Stakeholders identify key pages on IRS.gov and contribute to the design of paper prototypes, and participate in data analysis.
- **Observer/Team Members** – Team members contribute to the design of paper prototypes and in data analysis. They may observe design sessions, and answer questions or resolve issues.

Cost of Study

$15,000

Location(s)

Research will be conducted at the IRS Nationwide Tax Forums:

- Las Vegas, NV; July 7, 2009
- San Diego, CA; July 14, 2009
- Orlando, FL; August 4, 2009
- New York, NY; August 25, 2009
- Dallas, TX; September 8, 2009
- Atlanta, GA; September 22, 2009

Stipend

No stipend will be paid.

Recruitment Efforts

Tax Professionals attending the Nationwide Tax Forums will be given the opportunity to provide feedback on the organization, structure, and labeling of website information.

Participant Criteria

Any Forum attendee will be eligible to participate.

Burden Hours

Total Screened: N/A (Any Forum attendee will be eligible to participate)

Total Recruited: 8 people per forum, for a total of 48 participants

Travel Time: N/A (Participants will already be at the Forums.)

Total testing time averaged at 1.5 hours/participant = 72 hours

Total estimated burden is 72 hours

Efforts to not duplicate research

Other participatory design sessions with narrow focus will be conducted. These are the only sessions scheduled for the wide range of Tax Professionals customers.

Privacy, Security, Disclosures, Confidentiality

The IRS will ensure compliance with the Taxpayers Bill of Rights II. All participants will be treated fairly and appropriately.

Privavy will be safeguarded. During the testing sessions, participants will be identified to IRS personal by their first names only. In addition, no participant names will be mentioned in the usability study final report. Participants will be advised that observers from the IRS may be observing the session via video monitoring equipment and that their comments may be recorded to ensure accurate data capture.