

REINVENTING



Service

AT THE IRS

Vice President Al Gore  
Treasury Secretary Robert E. Rubin  
with the Front-line  
Employees of the IRS



**REINVENTING SERVICE AT THE IRS**

Report of the Customer Service Task Force

**Vice President**  
**Al Gore**

**Treasury Secretary**  
**Robert E. Rubin**



THE VICE PRESIDENT  
WASHINGTON

**Dear Mr. President:**

We are pleased to present to you this report by the IRS Customer Service Task Force, the result of the intensive review we commissioned last May.

For the past five years, this Administration has been committed not just to a fairer tax code, including cutting taxes for middle-class families, but also to fairer tax collection. Our philosophy is simple: the taxpayers don't work for us, we work for them.

We know that the vast majority of IRS employees are decent, hard-working public servants who want to provide quality service to the American people. We also know that even a single instance of unfair treatment of taxpayers is unacceptable — and we will not tolerate it. But most important, we know that a system that fails to meet taxpayers' needs simply must be changed.

This report — the work of the Treasury Department, the National Performance Review, and 30 front-line IRS employees and managers from across the country — reflects tens of thousands of hours of work. The Task Force reviewed customer complaints and reports on the IRS, interviewed experts and employees, and above all, listened to the concerns of the American taxpayer. The IRS has already begun to implement some of the report's recommendations: for example, in November, 1997, it began holding monthly Problem Solving Days, and in January, 1998, it extended the hours of telephone service to six days a week, 16 hours a day.

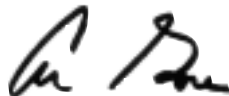
The report builds upon our actions in recent years to better serve the taxpayer. In July, 1996, you signed the Taxpayers' Bill of Rights 2 to give taxpayers more protection in dealing

with the IRS. The massive job of modernizing IRS computer systems is moving back on track, although there is a long road ahead. The IRS has become a leader in the use of the Internet to deliver information and forms to taxpayers. And in September, TeleFile, the IRS's telephone filing service, was one of just two federal programs recognized by the Ford Foundation and Harvard University's Kennedy School for outstanding innovation in government.

However, much more needs to be done. The Task Force identified more than 200 actions that can help improve how the IRS serves taxpayers. These actions are based on the idea that taxpayers deserve customer service from the IRS that is comparable to the best of the private sector. Customers deserve clearer forms and notices, timely answers to their questions, accurate resolution of their problems, and fair and courteous treatment.

We must work together with the Congress to ensure adequate funding of the initiatives necessary to advance these goals. While some of the actions in this report can be made within planned budget levels, others will require additional resources. In addition, these changes can only be made in partnership with the National Treasury Employees Union, which represents front-line employees. Bargaining unit employees served on the Task Force, and their enthusiasm for the actions gives us confidence that front-line employees will work with IRS management to create a customer-friendly IRS.

We must have an IRS that is on taxpayers' side, providing the help they need. We know we have a long way to go. But the good news is that the reform of the IRS has begun. With this report as a compass to help guide the way and with our new Commissioner Charles Rossotti's commitment to serving taxpayers, we can proceed on that important journey.



Al Gore



Robert E. Rubin



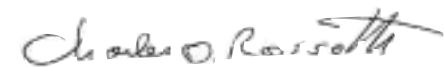
DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE  
WASHINGTON, D.C. 20224

### **A Message to the Reader:**

I wish to extend my personal thanks to the many fine IRS employees who participated on this task force and contributed to this excellent report. I also want to thank Vice President Gore and Secretary Rubin for their leadership in promoting high-quality service at the IRS. Without their support, this report would not have been possible.

I believe the recommendations outlined in this report will help us in creating an IRS that provides services that are consistently as good as those in the private sector. We will not be able to achieve this transformation overnight, but we have already begun to do more to meet our customers' needs. For example, on Saturday, November 15, 1997, we held our first national "Problem Solving Day," which allowed taxpayers nationwide to come into IRS offices to get their problems solved. Yet Problem Solving Day is only the beginning. There is clearly more that we can and must do.


This report provides a framework for me and the rest of the organization as we create a new customer service focus at the IRS. Each chapter title in the report is, in fact, a customer service goal for the IRS. For example, Chapter II.a. says "Simplify Forms, Notices and Correspondence." I wholeheartedly embrace these goals. They are the foundation from which we can build an IRS focused on providing the best service to American taxpayers. The task force recommendations in this report provide a road map which will enable us to make this vision a reality.



Charles O. Rossotti

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# I. Summary

***“For the vast majority of Americans who want to do the right thing, the IRS should do right by them, and that means treating them with respect and trust. And, it means recognizing that taxpayers are its customers.”***

**Vice President Gore**

Far too many Americans feel the Internal Revenue Service is not doing right by them, or that it doesn't treat them with the respect and trust they deserve. Taxpayers can't understand complex IRS forms, notices and procedures. IRS phones and toll-free numbers are often busy. Taxpayers who get through frequently get put on hold or transferred to a person who cannot answer specific questions. Taxpayers who do not speak English are unlikely to reach an employee who speaks their language. And even the simplest problems can take far too long to resolve.

On May 20, 1997, Vice President Al Gore and Treasury Secretary Robert Rubin launched a National Performance Review study to find ways to improve customer service at the IRS. The IRS Customer Service Task Force consisted of over 60 front-line IRS employees and managers, Department of Treasury officials, and members of the National Performance Review. The Task Force interviewed hundreds of people: it listened to complaints, read letters from taxpayers and met with tax preparers. The Task Force gathered ideas from others in government and the private sector, including businesses that excel in customer service and consultants who help those companies improve customer service.

The Task Force also looked at IRS pilot programs that have improved customer service and compliance and collected ideas from front-line employees. For example,