

Multilingual Initiative



*FTA Electronic Filing Symposium
Salt Lake City, Utah
May 14-18, 2006*

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Executive Order 13166



Requires Federal Agencies to ensure Limited English Proficient (LEP) taxpayers ***meaningful access*** to products and services:

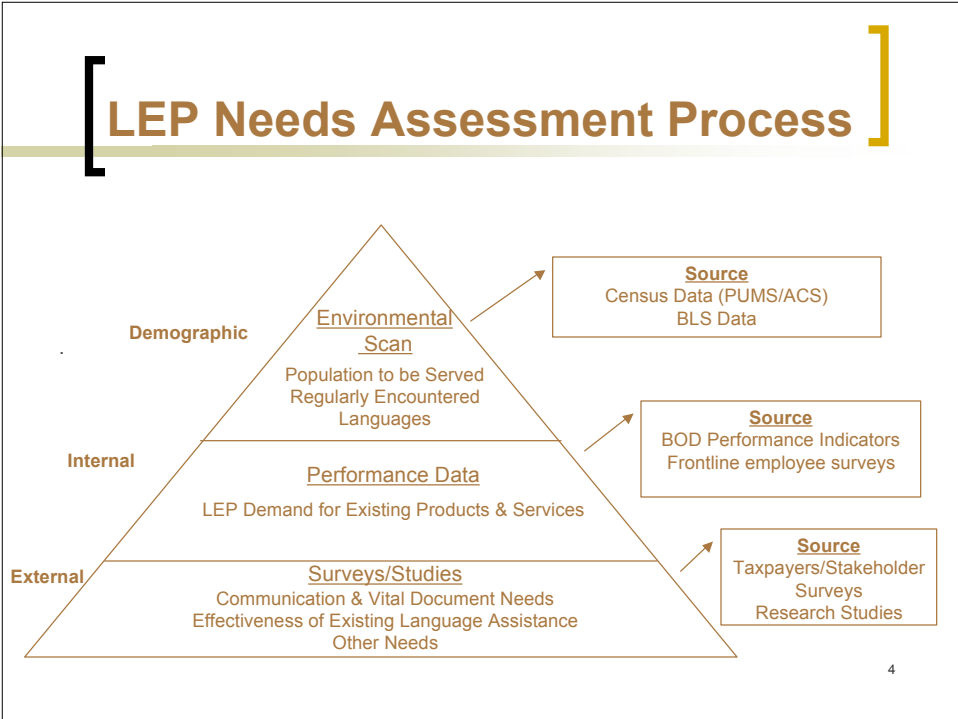
- **Conduct an assessment of language groups.**
- **Develop a policy for providing oral and written language assistance to these language groups.**
- **Monitor to ensure language assistance is meeting the need.**

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ASSESSMENT

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Summary of Findings Demographic Assessment

- ✓ Increasing LEP population.
- ✓ Spanish speaking LEP population located in concentrated areas/Ethnic Islands.
- ✓ Varying Dialects within Spanish Language groups.
- ✓ Low E-File Rates in Spanish Language Ethnic Islands.
- ✓ Low Income Tax Clinics (LITC) underrepresented in Spanish Language Ethnic Islands.

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Summary of Findings Internal Assessment

- ✓ **Increasing demand for IRS Non-English Products and Services.**
- ✓ **Spanish remains the greatest area of demand.**

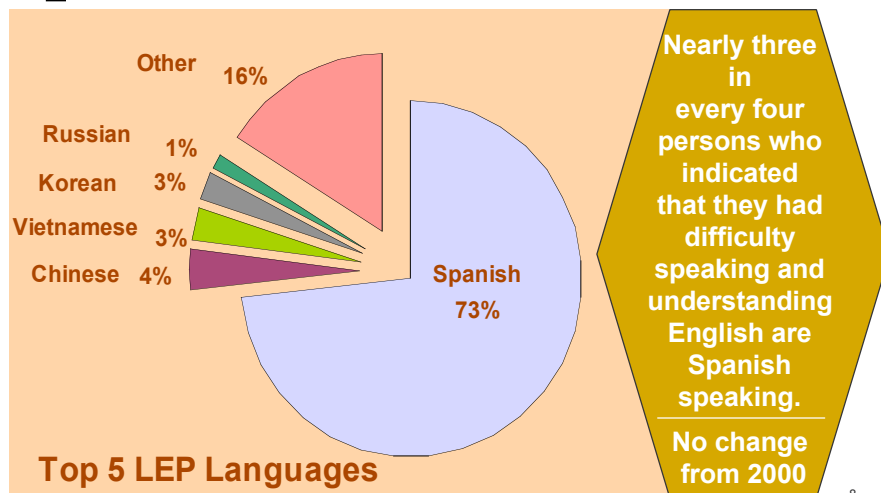
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Summary of Findings External Assessment

- ✓ Low awareness/Usage of Espanol Website.
- ✓ Heavy Reliance on Tax Practitioners for return preparation.
- ✓ Heavy Reliance on TV/Radio for tax information.
- ✓ Low Literacy Rates Among LEP.
- ✓ Generally Pleased with Spanish Services Provided by IRS.
- ✓ Education and Outreach Needs to be Targeted to Ethnic Islands.

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Findings - Demographic



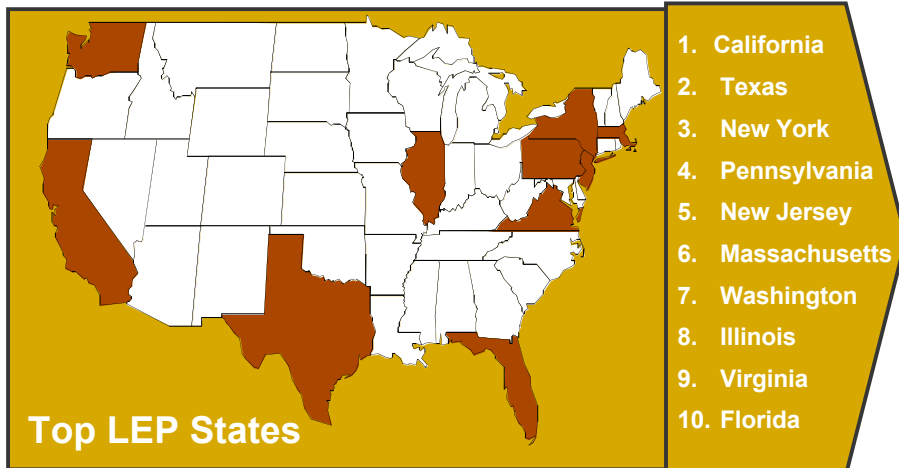
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Findings - Demographic

LANGUAGE	NUMBER OF LEP		CHANGE	
	2000	2003	Number	%
SPANISH	7,448,595	8,988,487	+1,539,892	+20.6%
CHINESE	476,461	457,463	-18,998	-3.9%
VIETNAMESE	336,408	370,175	+33,767	+10%
KOREAN	239,629	309,982	+70,353	+29.3%
RUSSIAN	180,689	177,488	-3,201	-1.7%
OTHER	1,762,717	1,961,321	+198,604	+11.2%
TOTAL	10,444,499	12,264,916	+1,820,417	+17%

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Findings - Demographic



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Findings - Demographic

Top 10 Spanish Language Ethnic Islands

1. Los Angeles, CA	6. South Gate, CA
2. Hialeah, FL	7. Corona, NY
3. Bell, CA	8. Mission, TX
4. Huntington, CA	9. Miami, FL
5. Union City, NJ	10. Chicago, IL

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Findings - Demographic

Spanish Language Dialects in the U.S. TOP 10 HISPANIC COUNTRIES OF ORIGIN (2000)

	Country	Number	States
1	Mexico	20,640,711	California, Texas
2	Puerto Rico	3,406,178	Illinois, New York
3	Cuba	1,241,685	Florida, New Jersey, New York
4	Dominican Republic	764,945	New York, New Jersey
5	El Salvador	655,165	Texas, New Jersey
6	Colombia	470,684	Florida, New York, New Jersey
7	Guatemala	372,487	Texas, Illinois
8	Ecuador	260,559	New York, New Jersey, Illinois
9	Peru	233,926	New York, New Jersey, Florida
10	Honduras	217,569	California, New York, New Jersey, Florida, Illinois

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Findings - Demographic

Top 10 Spanish Language Ethnic Islands Compared to the Top 10 Countries of Origin

City/State	Zip Code	Area	LEP	Country - Pct. - U.S. Concentration
1. Los Angeles, CA	90011	Los Angeles	30,785	Mexico – 64.9% (4 th largest concentration) El Salvador - 3.6% (2 nd largest concentration) Guatemala – 2.0% (2 nd largest concentration)
2. Hialeah, FL	33012	Miami	29,230	Cuba – 66.2% (Largest concentration) Columbia – 2.8% (Largest concentration)
3. Bell, CA	90201	Cudahy	27,065	Mexico – 70.5% (2 nd largest concentration) El Salvador – 3.5% (Largest concentration) Guatemala – 1.7% (Largest concentration)
4. Huntington, CA	90255	Walnut Park	22,460	Mexico – 73.9% (8 th largest concentration) El Salvador – 3.7% (4 th largest concentration)
5. Union City, NJ	07087	Weehawken	22,255	Cuba – 14.2% (2 nd largest concentration) Dom. Rep. – 10.5% (2 nd largest concentration) Colombia – 4.2% (3 rd largest concentration) Ecuador – 5.4% (2 nd largest concentration) Peru – 2.3% (2 nd largest concentration) Honduras – 2.0% (Largest concentration)

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Findings - Demographic

Top 10 Spanish Language Ethnic Islands Compared to the Top 10 Countries of Origin

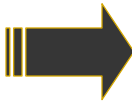
City/State	Zip Code	Community	LEP	Country - Pct. - U.S. Concentration
6. South Gate, CA	90280	South Gate	56,500	Mexico – 70.8% (3 rd largest concentration)
7. Corona, CA	11368	Flushing	47,340	Dom. Rep. – 17.9% (Largest concentration) Colombia – 2.8% (2 nd largest concentration) Ecuador – 10.1% (Largest concentration) Peru – 1.3% (Largest concentration)
8. Mission, TX	78572	Sharyland	21,165	Mexico – 79.5% (Largest concentration)
9. Miami, FL	33125	Miami	35,915	Cuba – 49.2% (5 th largest concentration) Honduras – 4.8% (2 nd largest concentration)
10. Chicago	60623	Otis Grant Collins	23,685	Mexico – 58.2% Cuba - .1%

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Findings - Demographic

Spanish Speaking LEP

- Median age 37
- Avg. Income \$38,068
- 92% Born Outside U.S.
 - 59% Married
- 3.9 Per Household
- 38% 6th grade or less
 - 3 Of 10 in poverty
 - 40% Homeowners
- 58% Do not own computer
- 8% Do not have phone



Primary Industries

Construction
 Restaurant
 Agriculture
 Landscaping
 Building Services

Primary Occupations

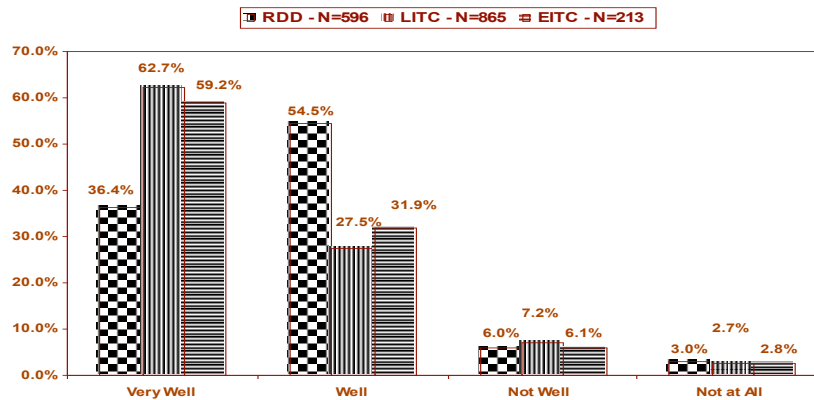
Housekeeping
 Agriculture Worker
 Janitors/Building Cleaning
 Cooks
 Grounds Maintenance

Private Company 88% Government 2%
 Self Employed 7% Unemployed 1%

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Findings- External

Ability to Read Spanish

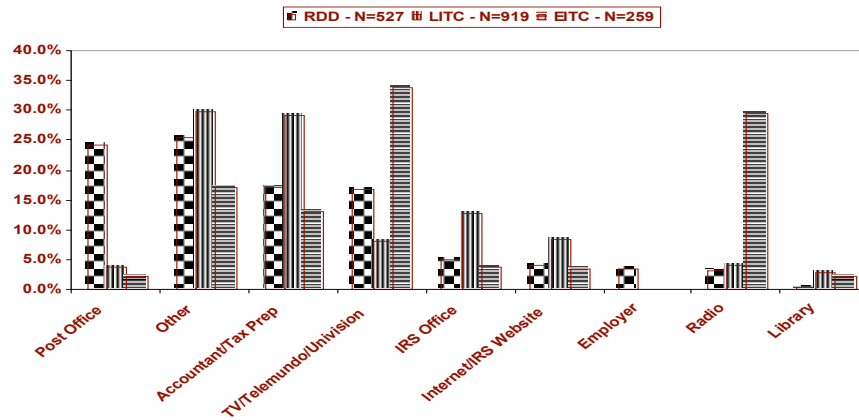


Source: RDD (2005 IRS Spanish LEP Survey) LITC and EITC (MLI 2005 LEP Customer Needs Assessment Survey)

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Findings - External

Information Obtained about the IRS

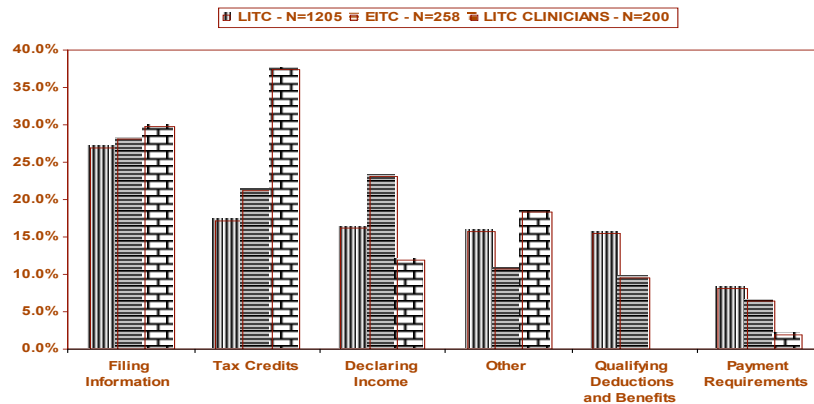


Source: RDD (2005 IRS Spanish LEP Survey) LITC and EITC (MLI 2005 LEP Customer Needs Assessment Survey)

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Findings - External

IRS Tax Products would liked Translated to Spanish

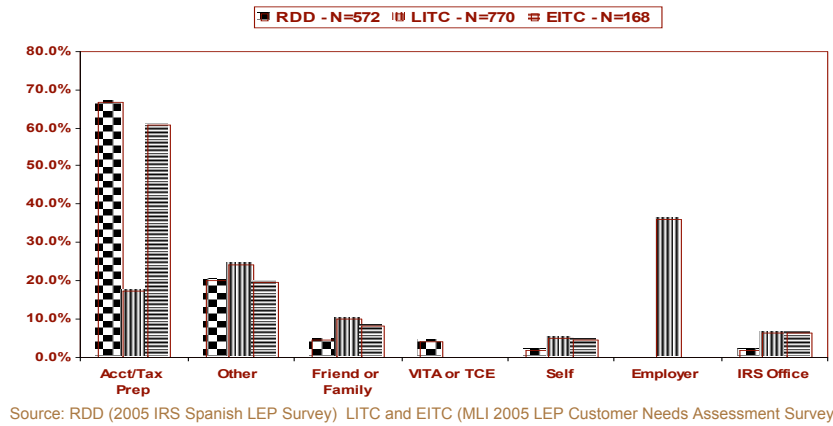


Source: LITC and EITC (MLI 2005 LEP Customer Needs Assessment Survey), and LITC Clinicians (MLI 2004 Stakeholders Needs Assessment Survey)

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Findings - External

Who Prepared Last Tax Return



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Findings – Internal/External

Top 5 E-File Locations (All Ethnic Areas)

Highest E-File Rates (Count)

	Zip Code	City	ST	Ancestry	Spanish at Home %	E-File Returns/ % of Total Returns	Population
1	10453	New York	NY	P.R.	55.7	15,057/58.0	15,291
2	10457	New York	NY	P.R.	57.1	11,991/55.6	18,841
3	10452	New York	NY	P.R. D.R.	59.9 52.7	13,732/55.4	15,291 15,666
4	33142	Miami	FL	HOND	46.8	10,042/55.1	1,800
5	10456	New York	NY	HOND	45.8	14,312/54.9	1,234

Lowest E-File Rates (Count)

1	33186	Miami-Dade	FL	PERU	61.8	9,424/17.0	1,596
2	60618	Chicago	IL	GUAT ECUA	41.6	14,920/19.5	2,065 1,457
3	33196	Miami-Dade	FL	PERU	45.7	6,167/20.2	1,047
4	33175	Miami-Dade	FL	CUB COLO	88.7	6,616/24.2	29,738 1,946
5	11377	New York	NY	PERU	35.2	6,599/24.4	1,300

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Findings- Internal/External

Spanish Language Ethnic Island Use of E-File New York Lowest Area

County	E-file %	Ancestry								Number Speaking Spanish at Home %
		P. R.	C U B	D. R.	S A L	C O L	E C U A	P E R U	H O N	
NY	17.0									87.1
Queens	20.6									89.3
Kings	28.3									84.9
Queens	19.9									90.6
Queens	22.9									84.9
Nassau	10.9									84.5
Suffolk	8.6									74.7

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POLICY

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IRS Multilingual Policy

IRS Multilingual Policy Statement P-22-3

“The IRS commits to provide top quality service to each taxpayer, including those who lack a full command of the English language. The needs of these taxpayers will be included in the agency’s strategic and tactical plans consistent with available resources. Our workforce will have essential tools necessary to interact appropriately with our diverse taxpayer base.”

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IRS Language Assistance Policy

In accordance with E.O. 13166, the IRS designates Spanish as a regularly encountered language:

- *Oral language assistance will be provided, vital documents may be translated if there are not alternative means for obtaining the information.*
- *Non-Vital documents may be translated for education and outreach purposes, within resource constraints.*

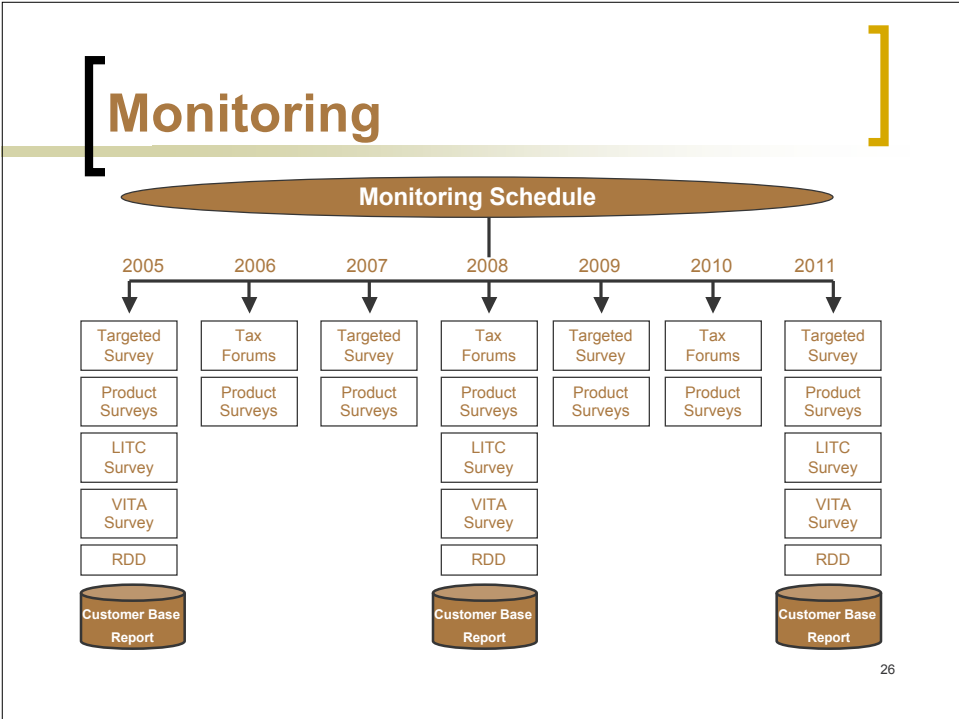
Where there are high concentrations of LEP taxpayers, speaking a language other than Spanish:

- *limited spoken language assistance and non-vital translations may be provided, within resource constraints.*
- *Vital documents will not be translated.*

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MONITORING

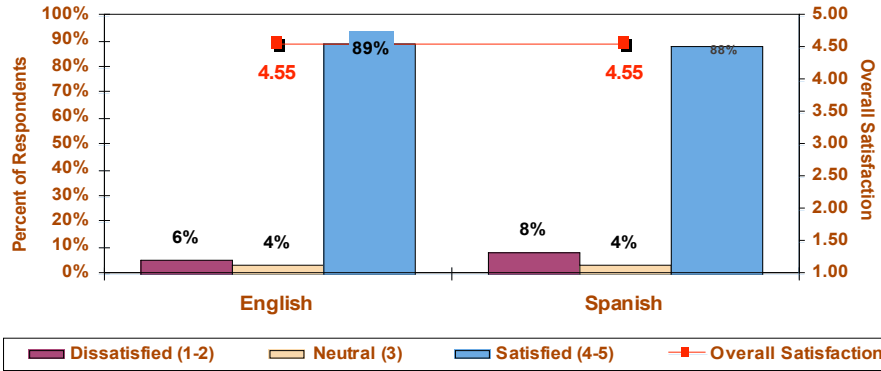
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Findings - Monitoring

Face-Face Assistance



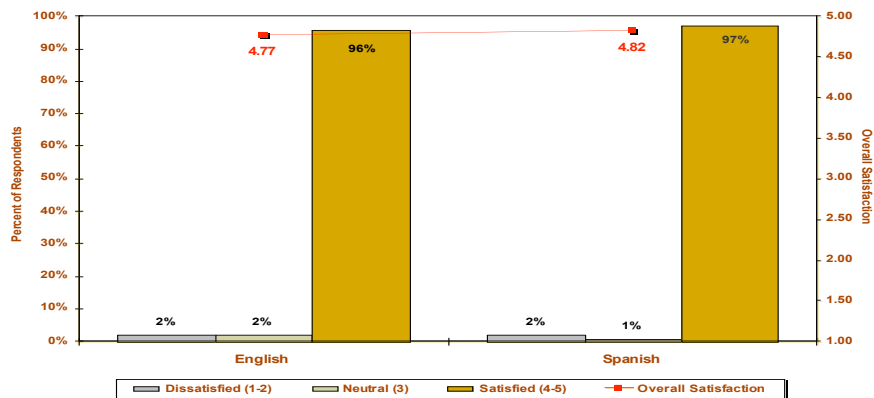
89% of Spanish speaking customers and 88% of English speaking customers are satisfied (giving a rating of 4 or 5) with the service they received.

Source: Field Assistance Customer Satisfaction Survey

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Findings - Monitoring

Education and Outreach



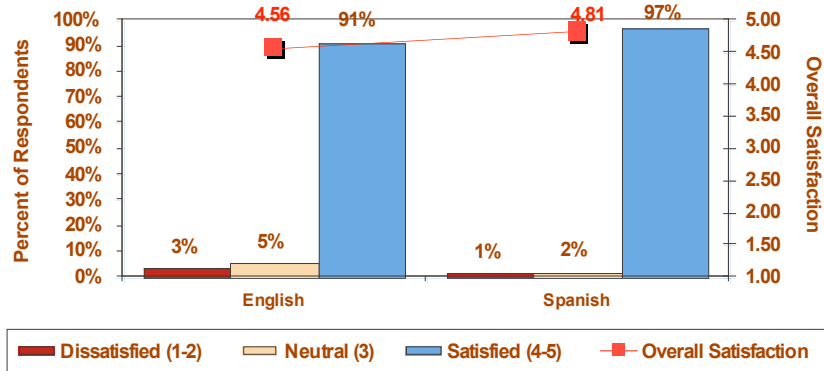
97% of Spanish speakers and 96% of English speakers are satisfied with the service they received

Source: SPEC Customer Satisfaction Survey

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Findings - Monitoring

Automated Collection System (ACS)



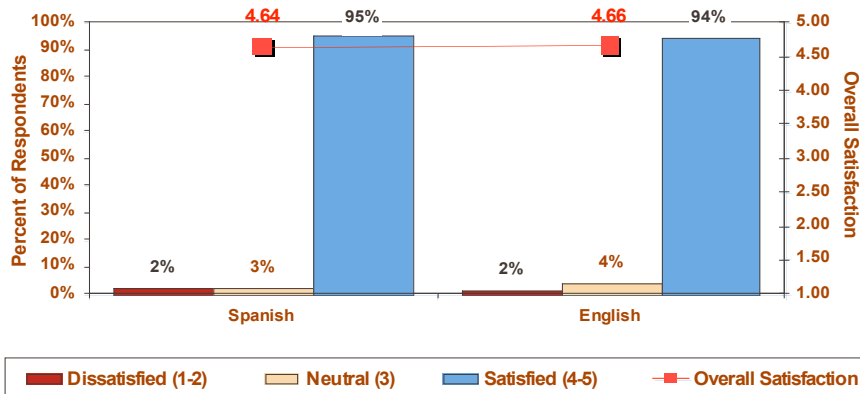
97% of Spanish speakers gave a rating of 4 or 5 on a 5-point scale. English speakers are less satisfied, but still gave a high overall satisfaction rating of 4.56.

Source: ACS Customer Satisfaction Survey

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Findings - Monitoring

Spanish Toll-Free Telephone



Overall Satisfaction with Toll Free is high, and there is no statistical difference between Spanish and English speakers.

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[Trends, Issues, & Problems]

1. Increasing LEP populations located in Ethnic Islands require focused marketing, communications, education and outreach.
2. Increasing demand for non-English/ non-traditional communications, education and outreach.
3. Limited use of electronic initiatives among LEP taxpayers.

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Questions???

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