



## ***FTA-IRS Tactical Advisory Group (TAG) Meeting***

***May 23, 2007***

***Hilton Pittsburgh  
600 Commonwealth Place  
Pittsburgh, Pennsylvania***

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## **FTA Multilingual Taskforce**

*A joint taskforce between the IRS MLI  
Strategy Office and the FTA TAG to  
develop recommendations for  
improvement initiatives which increases  
LEP taxpayer awareness and  
usage of e-file services.*

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## FTA/IRS Multilingual Taskforce

Federal/State collaboration on multilingual issues that impact electronic filing:

### State Representation

Arizona                      California  
New Mexico                Pennsylvania

### IRS Representation

MLI Strategy Office  
Field Media Relations  
ETA

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## Objectives

Conduct research to develop initiatives for increasing e-file usage, education, outreach, and communications to Spanish language Ethnic Islands:

- Determine and understand the triggers for significant variances in e-file usage in Spanish language Ethnic Islands.
- Identify best practices for increasing *e-file* usage in Spanish language Ethnic Islands.
- Identify best practices for increasing *e-file* education, outreach, and communication in the targeted areas.
- Develop a strategy for addressing the impact that the increasing Limited English Proficient (LEP) population has on electronic return filing.

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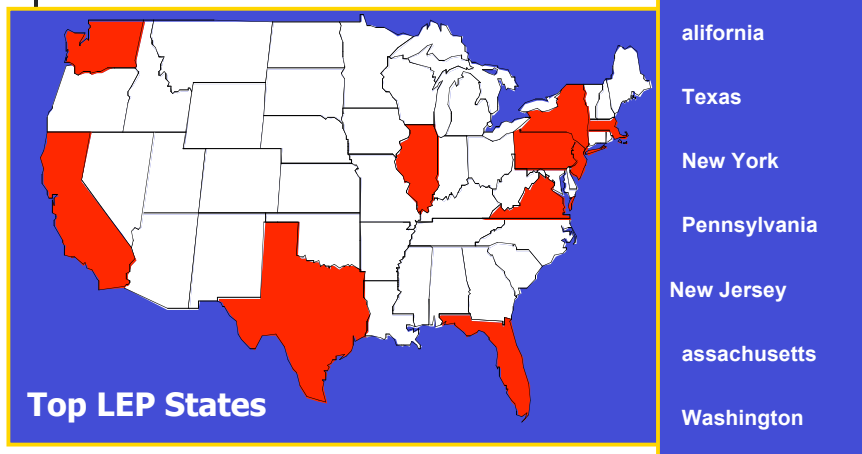
## Supportive Findings

The IRS has conducted extensive research to identify key the LEP language groups. Demographic studies, during the 2005 – 2006 period, disclosed the following:

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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## Supportive Findings

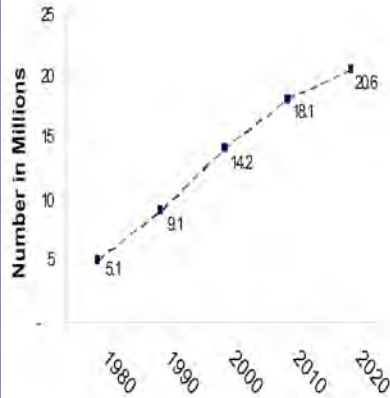


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## Supportive Findings

- Hispanic **LEP** population is projected to grow to **20.6 million**.
- The total Hispanic population is projected to grow to **58.8 Million**, representing another 59% increase.

### Projections By 2020



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## Supportive Findings

### Highest E-File Rates (Count)

	Zip Code	City	ST	Spanish at Home %	E-File Returns/ % of Total Returns
1	10453	New York	NY	55.7	15,057/ <b>58.0</b>
2	10457	New York	NY	57.1	11,991/ <b>55.6</b>
3	10452	New York	NY	59.9	13,732/ <b>55.4</b>
4	33142	Miami	FL	46.8	10,042/ <b>55.1</b>
5	10456	New York	NY	45.8	14,312/ <b>54.9</b>

### Lowest E-File Rates (Count)

1	33186	Miami-Dade	FL	61.8	9,424/ <b>17.0</b>
2	60618	Chicago	IL	41.6	14,920/ <b>19.5</b>
3	33196	Miami-Dade	FL	45.7	6,167/ <b>20.2</b>
4	33175	Miami-Dade	FL	88.7	6,616/ <b>24.2</b>
5	11377	New York	NY	35.2	6,599/ <b>24.4</b>

Varying E-file Rates in Spanish Language Ethnic Islands

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## Desired Outcome

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- The development of Federal and State strategies to increase e-file rates among Spanish speaking taxpayers.
- Federal and State implementation of best practice recommendations for improving e-file education, outreach, and communications.

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## MLI Survey

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- Published
  - Two Target Audiences
- Results to-date:
  - Community – 368
  - Business – 657

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# MLI Survey

- Data Submission

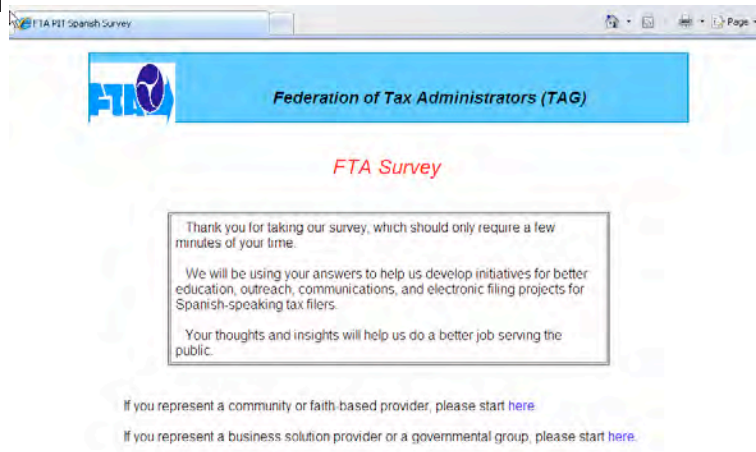
- <https://efile.state.nm.us/FTASurvey/>

- Results

- [https://efile.state.nm.us/FTASurvey/FTA\\_Results.aspx](https://efile.state.nm.us/FTASurvey/FTA_Results.aspx)

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# Survey Start



The screenshot shows a web browser window with the title "FTA Spanish Survey". The page features the logo of the Federation of Tax Administrators (TAG) and the text "FTA Survey". A central message box contains the following text:

Thank you for taking our survey, which should only require a few minutes of your time.

We will be using your answers to help us develop initiatives for better education, outreach, communications, and electronic filing projects for Spanish-speaking tax filers.

Your thoughts and insights will help us do a better job serving the public.

If you represent a community or faith-based provider, please start [here](#)

If you represent a business solution provider or a governmental group, please start [here](#).

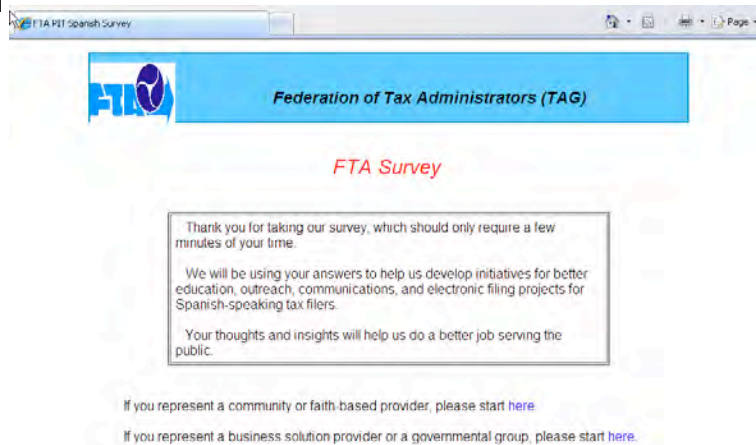
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# Survey Development

- Question Iterations (Team Effort!)
- Tech Team (NMWebFile)
  - C#.Net / SQL
- Answers / Output
  - By Answer Popularity
  - By Question Number
  - 4-Parameters to filter by (optional)
  - Free-form text Answers

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# Survey Output



The screenshot shows a web browser window titled "FTA PIT Spanish Survey". The page features the logo of the Federation of Tax Administrators (TAG) and the text "FTA Survey". A central message box contains the following text:

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We will be using your answers to help us develop initiatives for better education, outreach, communications, and electronic filing projects for Spanish-speaking tax filers.

Your thoughts and insights will help us do a better job serving the public.

Below the message box, there are two lines of text with blue hyperlinks:

If you represent a community or faith-based provider, please start [here](#)

If you represent a business solution provider or a governmental group, please start [here](#).

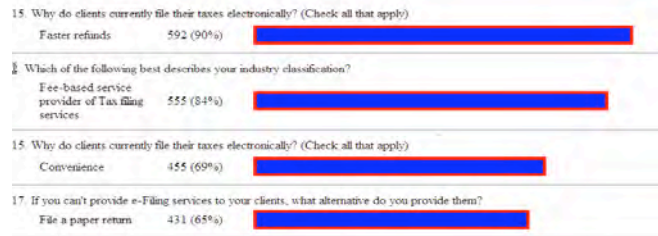
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# Survey Output: by Popularity



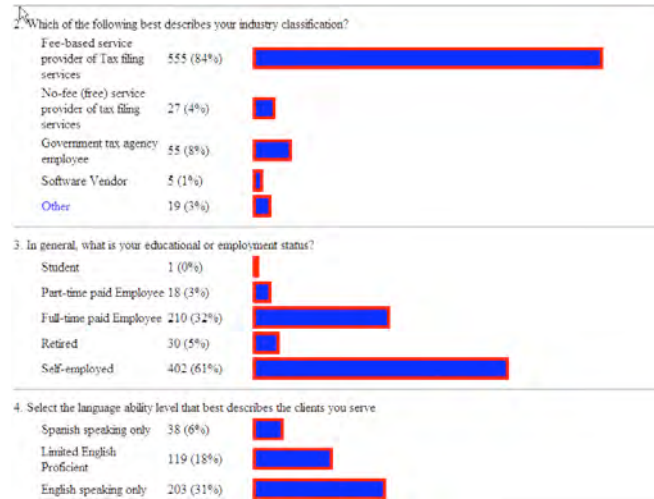
## FTA Survey Results Survey for Business Solution Providers Results in Response Order

Results generated Sunday, May 20, 2007 9:19 PM  
States included: Alabama, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, Florida, Georgia, Idaho, Illinois, Indiana, Iowa, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Ohio, Oklahoma, Oregon, Pennsylvania, South Carolina, Tennessee, Texas, Utah, Virginia, Washington, Wisconsin, Wyoming  
Responses: 660



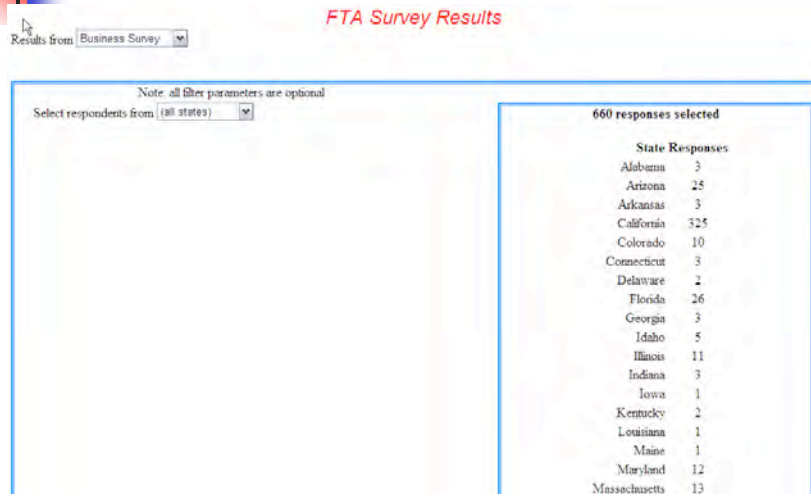
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# Survey Output: by Question Number



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## Survey Output: by State



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## Survey Analysis

- **Objectives:**
  - Identify Current Services
  - Identify Needs (improve deliverables)
  - Trend Comparative Analysis
    - National to Regional
    - Region to Region

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## Survey Analysis

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- **Objectives:** (cont.)
  - Identify Outreach Opportunities
  - Committee: Consensus on Outreach & Communications
    - Define Solutions
    - Make and publish Recommendations

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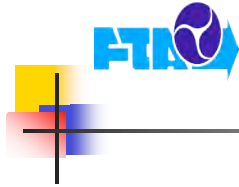


## Today:

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### ■ Discussion

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Thanks