

IRS Oversight Board

For immediate release
December 9, 2009
Media contact: Joelle Jordan 202-288-3241

IRS Reports FY2009 Performance Results to the Oversight Board

(Washington, DC) The IRS Oversight Board met on December 2, 2009 to discuss the IRS' performance over the past year as well as other issues relating to the agency. The Oversight Board was pleased that the IRS continues to make steady progress in meeting its strategic goals.

The IRS reported that in FY2009 it met most of the 66 annual performance measures monitored by the Oversight Board. These measures, established by the IRS and the Oversight Board last year, set quantitative targets to ensure that the agency is meeting its strategic goals: to improve service, enforce the tax law, and invest in high performance. The measures, their target goals, actual level achieved, and data definitions can be found at <http://www.treas.gov/irsob/measures/>.

Overall, measures for toll-free telephone level of service, accuracy in answering questions, and timeliness in providing tax products scored within their targets. Enforcement measures, including examination coverage and completion of criminal cases, also met their established targets. In addition, more taxpayers visited the IRS web site, and the number of taxpayers filing their tax returns electronically continued to grow and slightly exceeded IRS goals.

"The Board is pleased with the IRS' FY2009 performance," commented Board Chairman Paul Cherecwich, Jr. "Setting clear and meaningful measures gives the IRS an opportunity to demonstrate its focus on achieving strategic goals and producing tangible results for taxpayers."

The Board and the IRS also discussed the agency's goals for FY2010. Performance targets for FY2010 will be posted on the Board's web site once the FY2010 budget is passed by Congress and signed by the President.

FY2010 Filing Season Preparations Underway

At the Board's request, the IRS outlined its preparations for the FY2010 filing season, which begins next month. The IRS told the Board that work is well underway in preparing material, training seasonal workers, and programming and testing changes in its systems. The IRS assured the Board that testing indicated that the system will operate properly.

The Board expressed concern about an adequate level of telephone service for taxpayers who choose to ask the IRS tax questions using the toll-free telephones. Experience in the last two years has shown that greater numbers of taxpayers are calling the IRS for assistance, especially to inquire about new tax law provisions, and that service levels have fallen below the 82 percent achieved in FY2007. With many new tax provisions in place for the 2009 tax year, the Board is concerned that this trend will continue and service levels during the 2010 filing season will suffer as a result.

Discussions Included Enterprise Risk Management, Tax Preparer Regulations, and Business Systems Development

During its February 2009 public meeting, risk management experts briefed the Board on the importance of taking an enterprise-wide approach to risk management. In a planned follow up action, the IRS briefed the Board on its agency-wide approach to identifying and managing risks to its infrastructure, operations, and data.

Other subjects discussed during the meeting included the results of the IRS review of preparer regulations, which are expected to be released soon, and the status of the Customer Account Data Engine 2 (CADE 2) program.

Public Meeting Planning

The Oversight Board discussed possible candidate topics for its 2010 public meeting. Three topics were chosen for further development: 1) hiring, on-boarding, and enculturation of a high performing workforce; 2) corporate board governance of tax risk, and 3) enhanced approaches to dealing with the tax gap attributable to small business. Details on the meeting will be available in the coming weeks.

Chairman Reelected

Paul Cherecwich, Jr. was reelected to serve as IRS Oversight Board Chairman for a two-year term.

###