

VIII. Advancing a Climate of Advocacy Through New Approaches to Education

Education and training are the best tools TAS can provide to its employees. TAS leadership is committed to maintaining and enhancing employees' skills through comprehensive professional education and training. The National Taxpayer Advocate believes face-to-face training is the most effective method of providing continual education in problem-solving, advocacy, and other taxpayer-facing activities. However, given the significant limitations on training funds discussed above, TAS has explored and utilized alternative methods. TAS will conduct critical technical training for new hires in the classroom and deliver other training in a virtual environment at little to no cost.

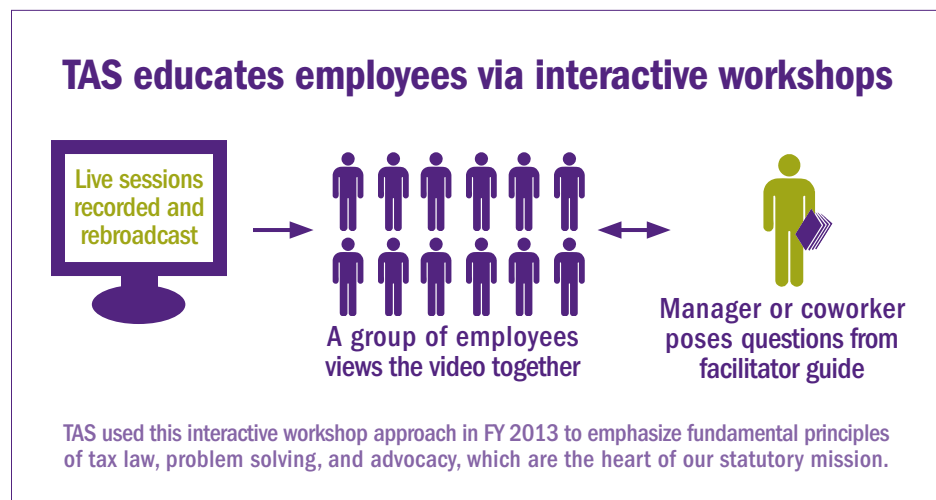
In FY 2013, TAS established three technical groups that will focus on the major categories of case types: Examination, Collection, and Accounts. These technical groups will:

- Review existing training material for currency, accuracy, and advocacy;
- Update materials in “real time” when laws or procedures change;
- Review and redesign the training schedule and format to build a stronger foundation of skills as new case advocates progress in their development;
- Provide training recommendations;
- Identify ongoing technical issues;
- Identify those in TAS with technical expertise for future training opportunities; and
- Develop advocacy-centric approaches to cases through analysis of TAOs and other materials.

TAS is using a combination of live and recorded sessions to deliver training to employees. With the current budget environment limiting face-to-face training, TAS records live sessions that can be viewed later by other employees. A group in an office can watch the video and respond to questions from a manager or co-worker acting as a facilitator. This provides an opportunity to reinforce the material and generate the kind of dialogue that is present in face-to-face training and leads to deeper understanding.

TAS used this interactive workshop approach in FY 2013 to deliver the Roadmap to a Tax Controversy training to our TAS employees and the LITCs. The core messages emphasized the fundamental principles of tax law, problem solving, and advocacy, which are the heart of our statutory mission. This training consisted of a series of videos recorded by the National Taxpayer Advocate and experts on the legal and procedural issues involved in tax controversies, and how those issues affect us as we work to help taxpayers. TAS shipped DVDs of the video segments to all of its offices and LITCs, along with detailed participant and facilitator guides. Each office held facilitated training with groups of employees, played the videos, and paused at various points to discuss case examples. The guides for

the facilitators suggested questions to ask and possible courses of advocacy to resolve the taxpayers' issues.



In FY 2014, TAS will:

- Move to a continuous educational environment that offers learning opportunities throughout the year;
- Develop alternative methods when face-to-face training is cost-prohibitive;
- Develop short training modules on critical case issues to assist TAS employees in advocacy; and
- Continue to advocate for the need for face-to-face training in all aspects of taxpayer-facing activities.

A. TESIS Will Require Extensive User Training

TESIS training presents its own set of challenges. TESIS employees must be prepared to move seamlessly into the TESIS environment to avoid undue delays in assisting the taxpayers who are counting on TESIS's help. Because the current case management system, TAMIS, will be decommissioned when TESIS is launched, there is no "fallback." To deliver training timely, TESIS must identify the specific training needs of TESIS employees and IRS users based on anticipated TESIS functionality and develop training products while the system is still being built. The training must address both the content associated with each release and any interim processes and procedures necessary to ensure continuity of operations until TESIS is fully implemented.

All TESIS employees will need TESIS training. Much of the content will center on system features and functionality, but it also will include changes to work processes and

procedures that leverage TESIS's enhanced functionality and how we want it to support our work. For example, employees need to be educated on new case issue codes that will better enable TESIS to assign work to Case Advocates based on their skill level. This functionality will enable taxpayers to receive the full benefit of TESIS's advocacy from an experienced Case Advocate, while also contributing to our employees' satisfaction in that they feel they have the skills and knowledge needed to assist taxpayers with specific issues. TESIS will continue to identify and address specific training needs through the PMO until TESIS is fully deployed.

TESIS has developed a comprehensive training plan that includes the flexibility to update training products with each TESIS release to account for new or changed system functionality and applicable changes to TESIS policies, processes, and procedures. TESIS will use a blended training approach to meet employees' training needs based on their work responsibilities and the role they have been assigned in TESIS. These roles include, but are not limited to: Intake Advocate, Case Advocate, Technical Advisor, and Manager. TESIS will also train employees in the IRS who are expected to use TESIS, such as to create TESIS cases and respond to OARs.

Adding complexity to the scope of training, employees in the same user role may have different TESIS permissions built into their profiles. TESIS's training plan is designed to accommodate all roles and profiles, and allow employees the flexibility to learn about functionality for other user roles. Employees will be able to participate in self-guided activities in addition to the formal training. Training will be delivered face-to-face and virtually, and include job aids, user guides, and a training database to enable hands on practice.

An essential component of training will be preparing employees for the transition to TESIS and enabling them to see the bigger picture of how TESIS will revolutionize TAS. Prior to training, TAS will share ongoing TESIS news, knowledge, and events with employees to introduce them to some of the changes and let them know what to expect when TESIS goes live. Employees will be able to hear more about specific TESIS features and capabilities from their peers and TAS leadership, and participate in activities such as TESIS demonstrations for various user roles and specific tasks.