By Kristina Yin

Surveys, Surveys, Surveys

8/29/2022

About Me

Hello! I’m Kristina!

Design Fellow @ IRS (she/her)

I recently graduated Santa Clara University with a BS in Computer Science & Engineering with a minor in Studio Art. I am interested in the intersection of art and technology, and human-computer interaction. My passion is to build equitable digital spaces and services.

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Civic Digital Fellowship

The Civic Digital Fellowship is a first-of-its-kind model that encourages **early-career technologists** to explore careers in public service through a **10-week internship**.

As part of the 2022 cohort, accepted with a 10% acceptance rate, I engaged with members of the civic tech community through mentorship, speaker events, and presentations of various organizations like USDS, 18F, etc.

I applied to the Fellowship with an interest in driving **innovation for social change** in the government.

Taxpayer Behavioral Lab

The **Taxpayer Behavioral Lab**, which is part of the Research, Applied Analytics, and Statistics (RAAS) division of the IRS, consists of social scientists, statisticians, tax law specialists, etc. who conduct research into understanding the **burden incurred by taxpayers in order meet their federal tax-reporting responsibilities**. They research cost-effective ways to help taxpayers **overcome barriers in claiming the tax benefits** that they are entitled to and to **encourage tax compliance**. The lab’s robust **Burden Models** are used to inform tax policy, regulatory guidance, and program improvement.

Main Challenge

The Brief

The Fellow will create and update existing **Taxpayer Burden Survey** paper instruments as well as create a new, visually pleasing **user-friendly web survey template** to be used across all Taxpayer Burden Survey web surveys.

The Impact

My work supports the initiative to transition taxpayer burdens survey work from contractors to RAAS, which will substantially **reduce the cost of the research** as well as **shorten turnaround time** from project start through final data collection.

Objectives

- Teaching Qualtrics
- Gift Transfer Tax Burden Survey
- Questions Library
- IRS Survey Themes
- Code Documentation

Teaching Qualtrics

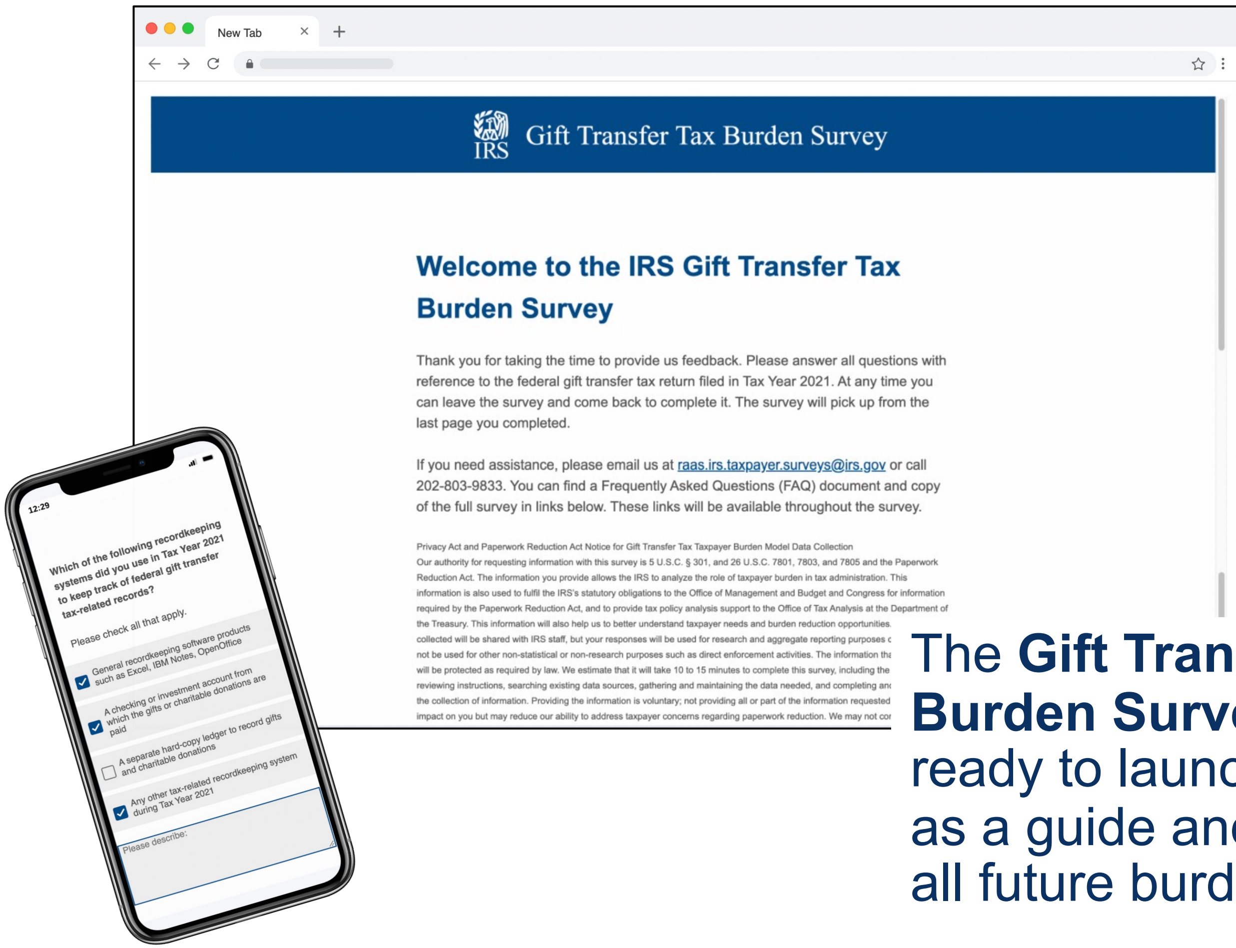
Qualtrics Training

- Led “Introduction to Qualtrics” event on 7/11 for license holders and secondary support staff
- Assisted the brand administrators with setting up the licenses and allocating the response pool among all IRS research divisions

Quick Start Guide

- Compiled list of Qualtrics self-help resources
- Qualtrics handguide ~78 pages
- Starting guide for successor VIS staff detailing how to use resources to set up burden surveys
- Assisted third-party contractors' format soon-to-be launched surveys using custom code

Gift Transfer Tax Burden Survey



The **Gift Transfer Tax Burden Survey**, (almost) ready to launched, will act as a guide and template for all future burden surveys.

Question Library

I built a library of **common question types** for burden surveys (each with specific formatting, validation, logic, and code added) that any TBL member can easily access and copy into new surveys.

How much time did you spend on tax-related activities?

Which of the following methods did you use to prepare your…

How much money did you spend to comply for federal tax…

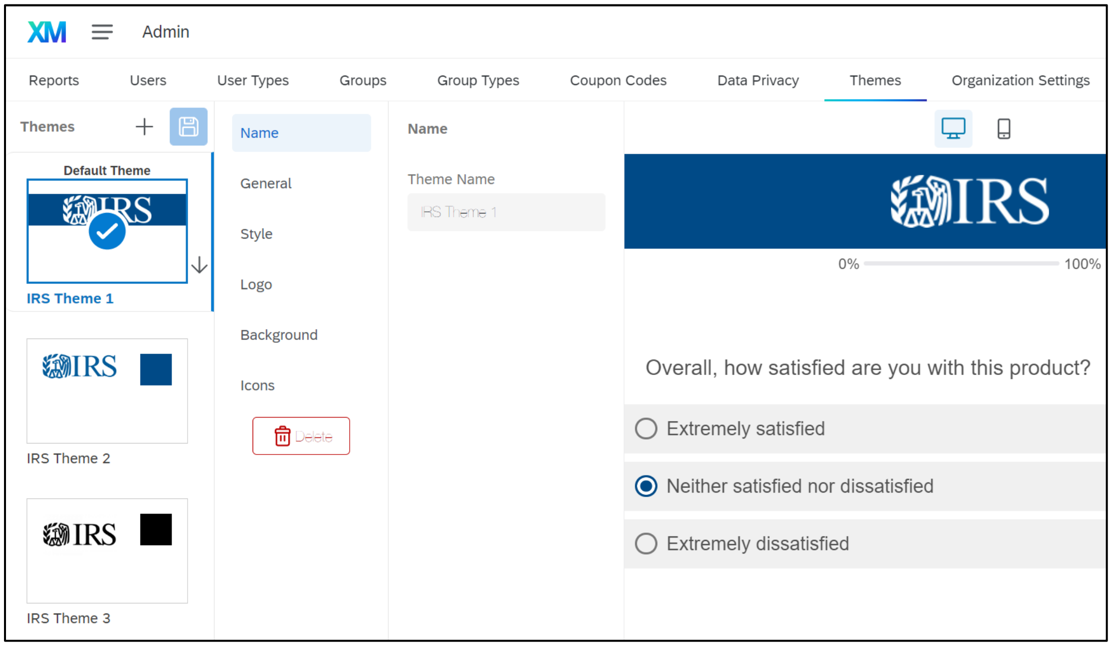
ne most difficult omplying with tax…

Please provide suggestions for how the IRS could impro…

What record-keeping systems did you use to prepare your federal…

How much time spend on tax- activities

Themes



IRS Theme 1

IRS Theme 2

IRS Theme 3

I created three different Qualtrics **themes** with IRS branding, following institution design standards.

Code Documentation

I compiled and documented all the **code snippets** I wrote in HTML, CSS, and JavaScript, into one document with detailed comments about their definition, functionality, and implementation.

In total, this represents **~150 lines of code**, not including comments and experiments that ended not being used in the final survey version.

Side Projects

Reformatting Letters

Adjusted communication letters for a new printing pipeline

Automated Form Fill

Investigated ways to automate form fill using existing services

Visualization of Data

Learned ways to depict relationship between income, tax return, and EITC credit

Lessons Learned

- Research & Survey Building
- Section 508
- Following Brand Guidelines
- Working in the Government
- Stuff Happens
- Think Outside the Box

Next Steps

Work →

Resources I made will be used for **years to come**, including by other research divisions across the IRS as they adopt Qualtrics.

Personal →

After the summer, I will be applying to **graduate school** for a master's degree in Human-Computer Interaction. I really hope to return to public service in the future!

Thank you!

Brenda, for being such an incredibly supportive and welcoming manager

Scott and **Kris**, for offering great direction and guidance

Andrew, for leading the CDF program in the IRS and offering thoughtful insight about governmental work

Linda, for being my NextGen mentor and taking the time to check-in and offering help if needed

Akua and **Haren**, for taking the time to talk about their careers in the IRS and answering my questions

The entire **TBL team** for welcoming me with open arms!