

CASE STUDY

The IRS Finds Value by Hiring Workers With Disabilities

By Katie Kuehner-Hebert

Sometimes streamlining operations can benefit both employers and employees. This was the case recently for the Internal Revenue Service. After brainstorming for ways to outsource some of its less-complex call center positions, in 2003 IRS officials decided to leverage the talents of workers with severe disabilities who are unable to leave their homes.

“The IRS is extremely committed to having a diverse workforce and leveraging that workforce to achieve the IRS’ mission,” said Monica Davy, executive director of the IRS Office of Equity and Diversity and Inclusion. “In addition to focusing on the diversity of our employees, we’re making sure that we consider the diversity of the population when enforcing the tax code and increasing voluntary tax compliance.”

The IRS partnership has freed up its resources to handle more complex tax law and accounts, and has provided jobs to a portion of the public who have severe disabilities but can work from home.

While Davy is responsible for making sure diversity and inclusion are key business strategies at the IRS, the idea to contract services from workers with disabilities came from accounts management, a component of IRS’ Wage and Investment Division. Rhonda Herman, senior manager of accounts management, said the initiative was born from a decision to use a vendor to take calls for form requests and other non-technical questions. “Outsourcing these calls could free up resources to handle more complex issues, as we are the only ones equipped to handle those,” she said.

The IRS then put out a solicitation for bids for an Ability-One contract, established by NISH, an independent agency that supports employment for people with severe disabilities. Boston-based National Telecommuting Institute, or NTI, a nonprofit organization, won the contract.

SNAPSHOT

The Internal Revenue Service needed to leverage its in-house professionals to answer taxpayers’ questions about complex tax law issues, so it outsourced all other calls for tax form requests and nontechnical questions. The agency chose to use homebound workers with severe disabilities hired by the Boston nonprofit National Telecommuting Institute. The workers’ quality and level of service have exceeded the IRS’ goals.

The work has been a godsend to hundreds of homebound people with disabilities, said Alan Hubbard, NTI’s chief operating officer. “Every day there is at least one worker who thanks us and tells us they never thought they were going to get a job again,” he said. “The average person we help has been out of work four years.”

How the Program Works

NTI finds homebound workers with disabilities through the Social Security Administration’s Ticket to Work program. The agency obtains permission from people receiving disability benefits to share their name and contact information. The nonprofit then reaches out to those people to see if they are interested in working in at-home jobs. If they sign on, the Social Security Administration reimburses NTI for its expenses as an incentive to offset disability benefits with income.

NTI first pre-screens applicants to determine if they are able to handle call center work, Hubbard said. “It’s not easy being a call center agent — nobody calls just to thank them for a good job; they call with problems,” he said. “We want them to understand that it’s a challenging position, so we provide a weeklong training program, Call Center 101, to make them the best call center agent they can be.”

NTI also helps workers understand what it takes to set up a home office and how to use customer relationship technology, including integrated voice recognition technology. The nonprofit also role plays with workers to demonstrate what it takes to be a good call center agent, including how to handle irate callers.

When people graduate from Call Center 101, they are placed in NTI’s applicant pool with access to the nonprofit’s online job board. NTI will also conduct job-specific screening for or-



The National Telecommuting Institute's officers and staffing professionals are shown in the Boston office. Courtesy of National Telecommuting Institute

ganizations. For the IRS contract, homebound workers with disabilities are employed by NTI, the outsourcing vendor.

The IRS employs 200 to 300 order-entry clerks hired by NTI every year. Such workers live nationwide and handle IRS forms and some informant referrals, providing callers with a form they can use to report anyone they believe is not complying with tax laws.

The IRS Joint Operations Center routes telephone calls for all of these issues to NTI, Herman said. Employees retrieve information through an Internet connection to the IRS, verify addresses and enter orders.

Surpassing Goals Every Year

The service the IRS has received from NTI workers has been stellar, Herman said. The agency has a centralized quality control system which reviews random call samples monthly for accuracy, completeness and adherence to IRS procedures.

NTI is contractually required to achieve a quality result of 96.5 percent monthly; as of Feb. 28, its quality score was 99.7. The goal for level of service — answering a certain percentage of calls — contractually is 82 percent; as of March 30, NTI achieved 83.7 percent.

Because of late congressional approval of some tax law changes this past season, Herman said the IRS had late form delivery, so the agency received more calls than initially projected. However, NTI's workers were able to answer more calls than the IRS forecasted they would be able to handle.

"They tried to answer as many calls as possible to ensure the taxpaying public was serviced," she said. "We appreciated this greatly, and we're sure the public did, too. They are very adaptable and flexible and accept additional work to support the IRS when they are asked to do so."

While NTI hires about 150 to 200 new workers for the IRS contact a year, many homebound workers return because they enjoy the job, Hubbard said.

In fact, one of NTI's IRS order entry clerks who is visually impaired arranged her home office specifically to better handle her duties for the IRS, he said. As an accommodation she attached three monitors to her computer, which enabled her to not only maximize the font size of the form information on each screen, but also move back and forth between the screens to get a better view of the information.

"She did this on her own and did not ask for reimbursement for her accommodation, which shows how committed she is to her job," Hubbard said.

The IRS renewed its contract with NTI in 2009, and finds the arrangement helpful in achieving key business goals, Herman said. For instance, the contract has freed up IRS resources to handle more complex tax law and accounts, and has provided jobs to a portion of the public who have severe disabilities but can work from home. "There are not a lot of jobs out there for persons with disabilities who cannot leave their home," she said. "That we can provide a job is definitely a positive for this population. They want to be able to work and be productive."

"As the head of diversity, this initiative makes me proud," Davy said. "It demonstrates that we see the value different folks can bring to the table, and it allows us to tap into talent that we otherwise wouldn't be able to use."

NTI has been able to provide these services in part because of a grant from the New Jersey-based Kessler Foundation. Until the 2011 grant, NTI was facing funding shortages caused by a loss of government funding. Hubbard said the grant has made up for these funding cuts, allowing NTI to grow and help more people with disabilities find jobs.

"We are moving forward with our overall mission of creating a true 21st century workforce, inclusive to those with disabilities," Hubbard said. «

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