

# Independent Office of Appeals Focus Guide



## A message to the Appeals workforce from the Chief and Deputy Chief

We are pleased to share the Independent Office of Appeals (Appeals) fiscal year (FY) 2024 organizational priorities. This past year we celebrated the first anniversary of the Inflation Reduction Act (IRA). The IRA Strategic Operating Plan puts modernization, employee engagement, and taxpayer service at the forefront of our mission. This year's key focus areas align with the IRS SOP and reflect Appeals' core values.

Investing in our workforce is one of our top priorities. Building an engaged and collaborative team of properly equipped personnel is the key to how we'll meet our mission to America's taxpayers. We're excited about our robust recruiting efforts to attract strong candidates to Appeals and new streamlined hiring procedures that allow us to hire more quickly than in the past. We're starting the year strong, and we thank all of you who have raised your hand to serve as recruiters, on-the-job instructors, mentors, and trainers for these new hires. Your efforts are critical to developing our well-equipped and high-performing workforce.

In addition to expanding our workforce, Appeals will focus this year on the experience of our existing workforce. We'll be looking for your input on the "employee experience" in Appeals and what more we can do to provide opportunities for employee engagement and development. We have enjoyed hearing about the in-person engagements many of you have held within your work teams and how you've also used videoconferencing to interact with your colleagues for training, team meetings, and other developmental activities. As the Appeals executive team visits our offices around the country, we look forward to hearing your ideas for promoting employee engagement, recognition, and retention.

Of course, we'll maintain our focus on the core business of hearing taxpayer appeals and resolving tax controversies without litigation. We hosted a series of "Art of the Conference" training sessions this past year for our taxpayer-facing workforce and appreciated hearing you share your best practices for ensuring that we give taxpayers the opportunity to be heard, we operate with the highest degree of professionalism, and we apply the law impartially. We also kicked off FY2024 with another in our series of "Practitioner Perspectives" panel discussions, where we partnered with practitioners to discuss hazards of litigation. For FY2024, we'll continue these programs to ensure taxpayer interactions with Appeals are a positive and productive experience for all parties.

We continue our efforts to ensure that we engage with taxpayers in the way they can most effectively communicate with us. We've revised letters to ensure taxpayers and representatives are aware of secure messaging tools such as Taxpayer Digital Communications. Our letters also explain that taxpayers can choose telephone, video, or in-person conferences. And we've included manager contact information on our letters for questions that are properly directed at management. In FY2024, we are working to improve conference options for taxpayers who live in an area with limited Appeals presence. We also are exploring opportunities to achieve earlier tax certainty and issue resolution through expanded use of Alternative Dispute Resolution programs.

We will continue to implement modernization efforts and find opportunities to expand and improve our paperless processes. Securing new desktop scanners in multiple posts of duty allows for higher volume scanning. In FY2023, we promoted use of secure messaging on social media, on our webpage, and in speaking engagements. In FY2024, we will continue to leverage technology to increase the paperless exchange of information with taxpayers and their representatives.

Our FY2024 focus mirrors priorities from the IRS Strategic Operating Plan, and we hope you are excited for the transformation ahead. You play a pivotal role in our success, so as you read further, we hope you see where your efforts contribute to one or more of these areas. We encourage you to share feedback as to how we can best fulfill our critical role within tax administration of providing high-quality administrative appeals to our nation's taxpayers. We are proud to work with such a dedicated and professional workforce.



**Andy Keyso,**  
Chief, IRS Independent  
Office of Appeals



**Liz Askey,**  
Deputy Chief, IRS  
Independent Office  
of Appeals

## APPEALS MISSION

To resolve Federal tax controversies without litigation on a basis which is fair and impartial to both the Government and the taxpayer, promotes a consistent application and interpretation of, and voluntary compliance with, the Federal tax laws, and enhances public confidence in the integrity and efficiency of the Internal Revenue Service.

# Independent Office of Appeals FY 2024 Focus Areas

## Employee Engagement, Recognition and Retention

Appeals will foster a collaborative and inclusive culture that prioritizes employee engagement and recognition by:

- Developing a multi-year employee experience strategy focusing on improving employee engagement.
- Promoting in-person engagements focused on gathering feedback from employees.
- Leveraging technology to engage employees.
- Recognizing those who make meaningful contributions.

## Hiring, Training, and Employee Development

Appeals will focus on hiring, employee training, and manager development to strengthen our foundation of impartial, quality decision-making by:

- Implementing initiatives that focus on new hire training and onboarding and manager development.
- Coordinating in-person hiring events, focusing on mission critical occupations.
- Delivering multiple critical training events monthly throughout the year, including targeted training for employees and collaborating with IRS University.
- Expanding the use of mentoring, leadership succession, and other programs to help employees enhance qualifications and meet their short-and long-term career goals.
- Promoting and delivering successful leadership development programs.
- Ensuring first-year training is timely, consistent, comprehensive, and follows a logical path that meets organizational needs in line with current policy and law.
- Building a well-trained on-the-job instructor cadre.

## Alternative Dispute Resolution

Appeals will provide taxpayers with opportunities to achieve tax certainty and early issue resolution through new and existing programs by:

- Implementing new Alternative Dispute Resolution pilot projects that promote earlier tax certainty.
- Collaborating with internal and external stakeholders to increase awareness of Alternative Dispute Resolution programs that benefit taxpayers.

## Modernization and Process Improvements

Appeals will implement modernization initiatives to streamline and create efficiencies in work processes. Appeals will continue to improve processes and reduce managerial and employee burden by:

- Supporting Transformation efforts through Taxpayer Digital Communications, Document Upload Tool, and paperless processing initiatives to create efficiencies and reduce the overall life cycle of an Appeals case.
- Leveraging Service-wide efforts in Enterprise Case Management and modernizing Appeals' inventory and case management system.
- Exploring opportunities to pilot online appeals requests.
- Implementing recommendations regarding the optimal use of our administrative support resources.
- Improving Appeals Account Resolution Specialist customer service.
- Recommending and implementing changes to Appeals' issue management practices.