



MANUAL TRANSMITTAL

Department of the Treasury
Internal Revenue Service

11.53.2

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EFFECTIVE DATE

(04-15-2015)

PURPOSE

- (1) This transmits a revision to IRM 11.53.2, *Communications & Liaison, Small Business/Self-Employed (SB/SE), Operations Support (OS), Communications and Stakeholder Outreach (CSO), Communications - Internal, External & Web Communications*.

MATERIAL CHANGES

- (1) Editorial changes update organizational references, clarify guidance, and make the text easier to follow and use electronically.
- (2) This IRM contains the activities of the CSO Communications office and should be used in conjunction with other program/management documents.
- (3) Added IRM 11.53.2.2 SB/SE Communications director's office.
- (4) Update organization name throughout from "Communications, Outreach Systems and Solutions (COSS) to Operations Support (OS)"
- (5) Removed IRM 11.53.2.3.5(2)f
- (6) Added IRM 11.53.2.3.5(5) "g. Twitter", "h. Tumblr", & "i. Facebook"
- (7) Removed IRM 11.53.2.4(3)g
- (8) Added IRM 11.53.2.4.3 Mailbox Distribution Lists
- (9) Removed IRM 11.53.2.5.4 Design and Printing
- (10) Removed IRM 11.53.2.5.9 MySB/SE Standards and Guidelines

EFFECT ON OTHER DOCUMENTS

This material supersedes IRM 11.53.2, SB/SE Communications dated April 23, 2013.

AUDIENCE

Small Business/Self Employed Employees

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11.53.2
SB/SE CSO Communications

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11.53.2.1

(04-15-2015)

**Mission of the SB/SE
Communications Office**

- (1) The mission of SB/SE Communications is to help the SB/SE operating division fulfill the strategic plan and the mission of the IRS. The role of SB/SE Communications is to advance the division in meeting its business objectives through expert communication planning, support for all SB/SE functions, and support and delivery of servicewide IRS initiatives. In consultation with the business owners, SB/SE Communications designs, develops and implements communication strategies and plans, and delivers communications for internal and external stakeholders.
- (2) To accomplish the mission, the Director, Communications and staff will:
 - a. Consult with SB/SE functions to develop and implement strategic communication plans that encompass ongoing and emerging issues.
 - b. Provide communication planning and support to the SB/SE functions.
 - c. Work with SB/SE business owners to enhance program understanding and taxpayer compliance.
 - d. Work with business owners to identify objectives and key messages along with the appropriate communication products and methods to deliver SB/SE and IRS messages.
 - e. Establish and maintain effective collaborative relationships with key internal stakeholders.
 - f. Support outreach to the practitioner and small business communities by developing products for use by outreach personnel.
 - g. Ensure appropriate communication relationships exist across SB/SE operating units and with other IRS business operating divisions and functions.
 - h. Support servicewide realignment issues, as applicable.
- (3) The Director, Communications reports to the Director, Communications and Stakeholder Outreach (CSO).
- (4) The following managers report to the Director, Communications:
 - Chief, Planning and Support Branch 1
 - Chief, Planning and Support Branch 2
 - Chief, Web Communications Branch
- (5) Two branches have an embedded subgroup with a front-line manager:
 - Product Development Group is in Planning and Support Branch 1.
 - Visual Communications Group is in the Web Branch.

11.53.2.1.1

(04-15-2015)

**Communication
Resources and Tools**

- (1) The SB/SE Outreach Initiatives Database or OID (search Outreach Initiatives Database on MySB/SE) contains a consolidated summary of current SB/SE outreach initiatives, delivery schedules and related products. SB/SE employees use the OID to retrieve information about SB/SE programs for external outreach. Servicewide initiatives that require SB/SE outreach delivery are also included on the database. The database also features a section visible only to SB/SE Communications staff for internal initiatives, communication plans, products, vehicle use, and other related information. Specialists are responsible for uploading communication plans and products for their respective programs and keeping the information current during delivery time frames. Products on the OID that are not for external distribution, such as talking points, should include an "internal reference" watermark.

- (2) Each quarter SB/SE Communications develops an updated list of outreach priorities and shares it with liaisons conducting education and outreach. A designated specialist requests updates through the team leads of each branch within SB/SE Communications. Other sources for suggested topics are CSO Headquarters and Stakeholder Liaison Field and other IRS business operating divisions. Team leads review the OID views for which their branch or group is responsible and, in consultation with the managers, work with specialist assigned OID views to determine which topics and views require updates, additions, or deletions from the priority listing. Topics for the priority list must have at least one product (e.g. talking points, PowerPoint) in the OID view. If the product in the view is not a PowerPoint presentation, the communication specialist needs to add a slide with the name of the topic to the view. Then, the designated specialist:
- Consolidates the list of items received from the team leads.
 - Compares the list with existing content.
 - Edits outreach priorities page on MySB/SE.
 - Makes updates to the list during the quarter, as needed.
 - Informs Stakeholder Liaison Field and CSO Headquarters personnel that outreach priorities are updated by posting a message to the weekly outreach update page on MySB/SE.

11.53.2.2
(04-15-2015)
**SB/SE Communications
Director's Office**

- (1) The SB/SE Communications director's office supports all branches of SB/SE Communications on a daily basis. The staff coordinates and follows up on a wide variety of controls and actions items and has numerous project responsibilities in addition to the following:

11.53.2.2.1
(04-15-2015)
**SB/SE Communications
Executive Messages**

- (1) The Communications director's office is responsible for coordination and clearance for the SB/SE commissioner's messages to employees.

11.53.2.2.2
(04-15-2015)
**Process for Executive
Message**

- (1) The communications specialists will work with their functional points of contact to identify successes/highlights/accomplishments for use in monthly executive messages.
- (2) By the first of each month, the communications specialist contacts the functional POC for a few sentences about a program success, highlight, group accomplishment, etc. (The POC ensures that it is approved by the function's director or designee; no further approval from the function will take place).
- (3) Within one week of being contacted, the POC provides success/highlight/accomplishment to communications specialists.
- (4) Communication specialists will share input with writers' cadre.
- (5) Writers' cadre lead will share topics with SB/SE senior ops advisor who will determine which success the monthly message will address.
- (6) The Communications writers' cadre will draft the monthly message with assistance from communications specialists, as needed.
- (7) Messages are issued on the last Friday of each month.

11.53.2.2.3
(04-15-2015)
**International Visitors
Program**

- (1) SB/SE Communications serves as SB/SE's liaison with the Large Business and International Operating Division, which coordinates requests under the IRS International Visitors Program (IVP).
- (2) The IVP provides foreign officials with opportunities to discuss tax administration matters with IRS officials and observe IRS operations. LB&I's IVP office uses specific guidelines for approving visits and briefings and generally works through a network of contacts in IRS operating divisions, including SB/SE, to facilitate these requests. The IVP office reviews each request to ensure it is from a proper government taxing authority from that country. Generally, private citizens are not approved for visits or briefings and are referred to other sources (e.g., a student studying in the U.S. working on an advanced degree, or research paper on U.S. taxation policy).
- (3) All requests for SB/SE participation in the IVP should be directed to the Communications project manager.

11.53.2.3
(04-15-2015)
**Communication
Planning**

- (1) The communication planning process begins with the initial contact between the specialist and a client, proceeds through consultation, and concludes with development and implementation of a communication plan.
- (2) This section describes how to prepare and deliver a communication plan.

11.53.2.3.1
(04-15-2015)
**Roles and
Responsibilities**

- (1) SB/SE Communications supports and helps deliver the IRS strategic plan by creating and implementing communication plans to:
 - a. Communicate the goals of the IRS and SB/SE.
 - b. Provide internal and external audiences with accurate information to increase awareness, educate or change behavior.
 - c. Influence voluntary compliance of tax laws.
- (2) Specialists in Communications fulfill specific program responsibilities listed in the contacts directory on MySB/SE.

11.53.2.3.2
(04-15-2015)
**Communication
Planning - Stages**

- (1) The communication specialist assigned to a client, program, or initiative gathers information through research and by conducting client interviews. The specialist engages in an ongoing consulting relationship with the executive client or their staff to aid in accurately identifying business and communication objectives.
- (2) The specialist should use templates available on SharePoint to guide the discussion during the initial contact and to draft an appropriate communication plan.
- (3) A strategic communication plan is a results-driven plan of action with a measurable objective(s) communicating specific issues aligned with the business strategy. Features include, but are not limited to:
 - SB/SE and/or servicewide strategy the plan supports.
 - Measurable objectives supporting business goals.
 - Target audience(s).
 - Key messages for each audience.
 - Communication strategy that will be employed.
 - Tactical section that identifies:
 - Communication products

- Vehicles
 - Responsible persons
 - Timeline
 - Addendum outlining research and analysis (Optional)
- (4) Not all assigned projects require strategic communication plans. For communication actions not requiring strategies, specialist may use a communication plan or a tactical plan, as appropriate.
- a. A communication plan is a plan of action to communicate a specific issue, usually involving multiple tasks by multiple individuals occurring over a period of time. Plan features include, but are not limited to:
 - Audience(s)
 - Key messages(s)
 - Objectives
 - Tactics or communication activities
 - Timeline
 - Responsible persons
 - b. A tactical plan is a plan of action for accomplishing a particular communication project that requires completion of multiple tasks. Features generally include but are not limited to:
 - Specific tactics or communication activities
 - Timeline
 - Responsible persons
- (5) The plan is a working document subject to change; therefore, specialists should mark it as “DRAFT” until approved by the client and the Director, Communications or his/her designee.
- (6) Plans require clearance, including:
- a. Technical review by client.
 - b. Sign-off by Communications manager.
 - c. Final review by client. The communication specialist will provide final, approved copies to the client, communication manager, project backup (Communications), and post the plan to the OID.
- (7) Communication plans are working documents, subject to change throughout their implementation. The communication specialist and business owner share responsibility to develop the plan, and the communication specialist is responsible for keeping it updated.

11.53.2.3.3
(04-15-2015)
**Working with Other
Functional and
Operating Divisions**

- (1) SB/SE communication specialists develop and maintain relationships with their counterparts in other IRS functions (i.e., W&I, LB&I, TAS) and share information, using appropriate channels.
- (2) When exchanging information with specialists outside SB/SE Communications, communication specialists must observe the chain of command and protocol for all divisions and functions. They should also use discretion in matters of policy to avoid requesting or disclosing sensitive or proprietary information.
- (3) Specialists assigned to a cross-functional project team that includes communicators from other divisions or functions may discuss matters pertaining to the project. Specialists should use discretion in discussing or exchanging information that exceeds the project's scope. When in doubt, the specialist should

consult with the manager, team leader or other designated contact who may elevate the issue to the Director, Communications or designated official in the pertinent operating division or function.

- (4) This section does not apply to media contacts or queries.

11.53.2.3.4
(04-15-2015)
**Communication
Standards**

- (1) SB/SE Communications strives to achieve clear, concise, and active communications. Writing style conforms to Associated Press standards. The Associated Press (AP) Stylebook is the designated writing style guide, supplemented by the IRS Communications Style Guide. Communication specialists also follow the guidelines of the Plain Writing Act of 2010. Resources for writers are on MySB/SE.

11.53.2.3.5
(04-15-2015)
Communication Vehicles

- (1) SB/SE Communications produces several communication vehicles that reach internal and external audiences and has access to non-SB/SE communication organizations' vehicles. Communication specialists select the most appropriate vehicle(s) to distribute information and coordinate with non-SB/SE communicators to reach audiences outside SB/SE. A chart with detailed information on communication vehicles is available on SharePoint.
- a. Push communications alert readers to news, such as via email. Push is two-way, customized and sender accountable. Users receive communications without actively seeking them.
 - b. Pull communications offer readers the opportunity to seek information through the intranet. Pull is one-way, mass and receiver accountable. In the virtual world, pull communications include blogs, wikis, and websites. Users elect if, when and how they will act on the messages in the pull model of communications.
- (2) SB/SE-owned communication tools and/or vehicles that reach internal audiences:
- a. **SB/SE Connection** is an online newsletter for SB/SE employees (pull). On a biweekly basis, a push email goes to all SB/SE employees directing them to the newsletter and the current articles (push).
 - b. **SB/SE Collection News, SB/SE Exam News, and SB/SE Specialty News** are function-specific e-newsletters for those functions' employees (push).
 - c. **SB/SE Headline News** contains issues of interest to SB/SE employees. Weekly highlights sent by email to SB/SE link to intranet content (push).
 - d. **SB/SE Managers' Messages** contain issues of interest to SB/SE managers. Highlights sent by email to SB/SE managers link to intranet content (push).
 - e. **SB/SE Commissioner's Messages** contain topical monthly emails for all SB/SE employees (push). These messages are linked on the MySB/SE home page under Executive Messages.
 - f. **SB/SE's Business Unit News (BUN)** is a link from IRWeb to content posted on MySB/SE of interest to all IRS employees (pull). The BUN is on IRWeb in the "News from the Business Units" section.
- (3) SB/SE communication specialists work with an internal liaison who consults with servicewide Internal Communications on using the following communication vehicles to reach all IRS employees:

- a. **IRWeb Daily News** (i.e. Webbies) - Headline items posted at the top of IRWeb (pull)
 - b. **IRS Headlines** - Weekly email to all IRS employees linking to intranet content (push)
 - c. **Leaders' Alert** - Weekly email to all IRS managers (push)
 - d. **What Do You Think?** - Poll questions on IRWeb (pull)
 - e. **The Source** - Newsletter for all IRS communicators (pull)
- (4) SB/SE owns several communication vehicles that reach external audiences, including:
- a. **IRS e-News for Small Businesses**, emails linking to content on IRS.gov for small business owners and self-employed individuals (push to subscribers; subscription option available on IRS.gov).
 - b. **IRS e-News for Payroll Professionals**, emails linking to content on IRS.gov specifically affecting federal payroll tax returns (push to subscribers; subscription option available on IRS.gov).
 - c. **Stakeholder Headliners**, e-articles posted on IRS.gov, cascaded electronically by Stakeholder Liaison (SL) to stakeholders, and linked from e-News for Small Businesses or e-News for Tax Professionals (pull and push).
 - d. **SSA/IRS Reporter**, a quarterly newsletter posted on IRS.gov for employers, payroll professionals, and others who deal with payroll taxes and employee issues (pull).
 - e. **Webinars**, online training opportunities streamed live and/or recorded for later viewing.
 - f. **Practitioner/Small Business Forums/Meetings**, events hosted nationally and locally by CSO Headquarters and Stakeholder Liaison Field to provide updates on SB/SE programs and policies to stakeholder organizations (pull).
 - g. **Congressional Update** is a newsletter issued at least three times each year that provides information on IRS programs and initiatives to Congressional members and staff. The newsletter is produced as a joint effort among Governmental Liaison, Taxpayer Advocate's Office, Legislative Affairs, and SB/SE Communications (push).
 - h. **Video Portal** houses video and audio files for external communications (pull; push when a video is linked from a Headliner or SB/SE page on IRS.gov).
 - i. **IRS YouTube channel, Small Business playlist** (pull; push when a video is linked from a Headliner or SB/SE page on IRS.gov).
- (5) IRS Communications and Liaison Office offers several communication vehicles that reach external audiences. SB/SE communication specialists should coordinate placement through the SB/SE communication specialist or branch chief who serves as the liaison with the C&L program owner for each of the following vehicles:
- a. **IRS News Releases** - Announcements dropped to the tax services and issued to the media by IRS Media Relations (push)
 - b. **IRS Fact Sheets** - Topical information issued to the media by IRS Media Relations. Fact sheets are required for webinars (push)
 - c. **IRS Tax Tips** - Issued by the media to the public by IRS Media Relations (push)

- d. **IRS e-News for Tax Professionals and e-News for Fed-State and Local Governments, FSLG** - emails linking to content on IRS.gov (push to subscribers; option available on IRS.gov)
- e. **Nationwide Tax Forums** - IRS events for tax professionals held in six locations each summer (push)
- f. **IRS YouTube channel** - (pull; push when linked from news releases)
- g. **Twitter** - Tweets from @IRSnews provide tax-related announcements and daily tax tips. @IRStaxpros tweets news and guidance for tax professionals. Tweets from @IRSenEspanol have news and information in Spanish. (push)
- h. **Tumblr** - IRS uses this microblogging platform in both English and Spanish to share tax tips, podcasts and videos. (pull)
- i. **Facebook** - The IRS Facebook page provides information for taxpayers and tax return preparers. (pull)

11.53.2.4
(04-15-2015)
**Planning and Support
Branches**

- (1) The role of the SB/SE Planning and Support Branches is to develop and manage communications for SB/SE business owners and to collaborate with others in delivering key messages to internal and external audiences. Internal audiences may include all IRS employees and subsets such as SB/SE employees, SB/SE managers, etc. External audiences include the public and subsets such as tax professionals, small businesses, stakeholder groups, etc.
- (2) Chiefs, Planning and Support Branches 1 and 2 report to the Director, Communications.
- (3) Chiefs, Planning and Support Branches 1 and 2 and staff:
 - a. Consult with SB/SE business owners to plan communications.
 - b. Develop and implement communication plans.
 - c. Support SB/SE functions by developing and delivering communications for targeted internal and external audiences, as appropriate.
 - d. Identify key messages and deliver them using appropriate communication products and delivery channels, with a focus on electronic channels.
 - e. Collaborate with the Web Communications branch and other IRS communications functions to reach targeted internal and external groups.
 - f. Establish and maintain effective relationships with key stakeholders.
 - g. Support communications with external stakeholder groups by developing educational products and programs that support outreach.
 - h. Meet SB/SE executives' communication needs through messaging development and distribution.
- (4) One Product Development Group manager reports to the Chief, Planning and Support Branch 1.

11.53.2.4.1
(04-15-2015)
**Communications for
External Audiences**

- (1) The Planning and Support Branches are responsible for developing, finalizing, and distributing communications that reach targeted external audiences, including small businesses, industry groups, employers, and tax professionals, using specific communication vehicles. Products are distributed directly to the target audience and/or through SB/SE functions with stakeholder relationships, such as Stakeholder Liaison, Media Relations, and others.

11.53.2.4.2
(04-15-2015)

Communications for Internal Audiences

- (1) The Planning and Support Branches are responsible for developing, finalizing, and distributing communications that reach targeted internal audiences. Products are distributed directly to the target audience through SB/SE internal communication channels or distributed using appropriate non-SB/SE IRS communication channels.
- (2) The internal SB/SE channels include MySB/SE web pages, Connection newsletter, Headline News, Managers' Messages, Morning News Break and other products as needed.
- (3) Designated coordinators send story ideas, photographs, completed stories, and their accompanying links as well as other submissions to the assigned SB/SE communications specialist or designated co-specialist. Communications specialists determine the appropriate channel for disseminating the information.

11.53.2.4.3
(04-15-2015)

Liaison with HQ Media Relations

- (1) The Planning and Support Branches (PSB) are responsible for coordinating with servicewide Communications and Liaison on communications that are nationwide in scope and appropriate for distribution to the general public through the news media. Communication products may include news releases, fact sheets, tax tips, and other vehicles owned by Headquarters Media Relations.

11.53.2.4.3.1
(04-15-2015)

Responsibilities and Process

- (1) A PSB chief or an SB/SE communication specialist serves as liaison with HQ Media Relations on all national news issues. All contacts between HQ Media Relations and SB/SE employees, managers or executives will normally be coordinated through the designated PSB liaison.
- (2) Before developing communications for release to the news media, the SB/SE communication specialist with program responsibility for the content must obtain confirmation from HQ Media Relations (through the PSB liaison) that the subject matter is appropriate for news outlets and confirm the timing. The specialist should also allow at least a six-week window prior to the intended date of issuance. This specialist may be from any SB/SE Communications branch, depending on the program.
- (3) The communication specialist works with the program owner to obtain subject matter information.
- (4) Either Media Relations or the SB/SE communication specialist drafts the content to ensure proper format and clarity.
- (5) The specialist secures all appropriate reviews, which may include review for style by an SB/SE Communications branch chief or delegate and review for accuracy by subject matter experts, IRS Counsel and other technical reviewers. The program owner should provide final review and approval with the understanding that the content remains subject to edits by Media Relations.
- (6) The PSB liaison forwards the product to Media Relations for finalizing and issuing the communication to the media. Media Relations may also coordinate with IRS Counsel and Treasury on final reviews and approvals.
- (7) When the IRS news release, fact sheet, or tax tip is issued electronically to media and posted to IRS.gov and the intranet, the specialist may coordinate with other PSB specialists and/or the Web Communications Branch on additional internal or external communications, including links from MySB/SE. The

specialist is responsible for posting Web links to the documents on the SB/SE Outreach Initiatives Database as appropriate.

- (8) The directory listing SB/SE communication specialists' program assignments is on MySB/SE.

11.53.2.4.4
(04-15-2015)
Media Inquiries

- (1) A media inquiry is a request by the news media for information they may need for a news story. Inquiries include requests for official comments, interviews, and fact checking.
- (2) Due to the sensitive nature of media inquiry, timely and accurate action is essential.

11.53.2.4.4.1
(04-15-2015)
Roles and Responsibilities

- (1) HQ Media Relations receives and responds to inquiries from national media such as:
- *The Wall Street Journal*
 - *New York Times*
 - *Washington Post*
 - *USA Today*
 - Nationally circulated magazines and the tax press
- (2) The IRS Headquarters Media Relations office coordinates media requests. The HQ Media Relations office will contact the SB/SE CSO or Communications director or a PSB branch chief or liaison for assistance as appropriate with SB/SE related inquiries.
- (3) The PSB liaison contacts the specialist(s) assigned to the appropriate program(s) (i.e., Exam, Collection) requesting either answers to questions or the name of a subject matter expert or executive to respond directly to the reporter. The assigned specialist contacts the appropriate business owner to obtain the information and forwards the response to the PSB liaison. In certain cases, the liaison may contact the business owner directly. The Director, Communications must approve responses to sensitive inquiries and requests for executive interviews.
- (4) Inquiries from local media and niche media, such as industry specific magazines, may be coordinated through the IRS Field Media Relations offices. FMR specialists will contact the PSB liaison as appropriate with SB/SE related inquiries. SB/SE communication specialists contacted by FMR specialists regarding media queries should refer them to the PSB media liaison.

11.53.2.4.4.2
(04-15-2015)
Mailbox Approvals

- (1) An organizational mailbox is designed to be used as a shared access mailbox for a division, branch, section or organization.
- (2) All requests originating in SB/SE for an organization mailbox are subject to approval by the designated point of contact in SB/SE Communications.
- (3) The originator submitting the OS GetServices request should select the designated POC as the approver and provide the following information:
- a. Business justification for the mailbox
 - b. Proposed name of the mailbox (Note: all SB/SE mailboxes must begin with *SBSE)
 - c. Name and SEID of the designated mailbox owner,

- d. Name and SEID of a backup owner
 - e. Whether the mailbox requires secure messaging
 - f. Request assignment of the ticket to EOPS-ISD-EMMB-SEMS
- (4) In general, permissions to access and use an organizational mailbox are controlled by the designated owner who uses an Access To list in the Global Address Book to add and delete users.
- a. Right click on the list name and select Properties, Modify Members.
 - b. Then, follow the trail to add or remove permissions.
- (5) Originators requesting access to a mailbox should look in the GAB to identify the owner of the Access To list and contact that individual to request access. If no Access To list exists the mailbox owner should submit an OSGetServices ticket and:
- a. Provide business justification
 - b. Put "Access to Outlook mailbox *SBSE____," in the description section
 - c. Request creation of an Access To list
 - d. Provide name and SEID of owner
 - e. Provide name and SEID of back-up owner
 - f. Request assignment of the ticket to EOPS-ISD-EMMB-SEMS
- (6) Originators requesting to change the name of a mailbox should include
- a. Business justification
 - b. Name of the existing/old mailbox
 - c. Name of the new mailbox. SB/SE mailboxes must begin with *SBSE.
 - d. Request assignment of the ticket to EOPS-ISD-EMMB-SEMS

11.53.2.4.4.3 (04-15-2015)

Mail Distribution Lists

- (1) Distribution lists are created for large groups with membership populated automatically using personnel organization codes. Membership is updated automatically at least every two weeks.
- (2) Lists of more than 100 employees are restricted and only specific individuals granted permissions can use them.
- (3) Mail distribution lists begin with &SBSE
- (4) To see who/what are included in the list, right click on it in the Global Address Book and select properties.
- (5) If employees in a function do not receive an email sent to the distribution list, it is usually because their organizational codes are not the ones used to automatically populate the distribution list. This usually happens when someone is detailed or transferred.
- (6) Distribution lists are controlled by a Send To list in the Global Address Book.
- (7) Designated owners from the specific functions control who can use the lists to send messages.
- (8) Requests to change the owner of a distribution list should include the following in the OSGetServices ticket subject to approval by SB/SE POC:
- a. Business justification
 - b. Detailed information about the change

- c. Select designated POC as approver
 - d. Request ticket assignment to EOPS-ISD-EMMB-SEMS
- (9) Requests to change the name of a distribution list should include the following in the OSGetServices ticket subject to approval by SB/SE POC:
- a. Business justification
 - b. Detailed information about the change
 - c. Name of new owner, if applicable
 - d. Request ticket assignment to EOPS-ISD-EMMB-SEMS

11.53.2.4.4.4
(04-15-2015)
**IRS e-News for Small
Businesses and IRS
e-News for Payroll
Professionals**

- (1) An SB/SE communication specialist in a PSB has primary responsibility as editor for e-News for Small Businesses and e-News for Payroll Professionals. The editor will collect and edit articles, format the newsletters and prepare them for electronic distribution from the GovDelivery site.
- (2) Before release the editor:
 - a. Confirms content, timing and any substantive changes to draft articles with the specialist who has program responsibility for the subject matter.
 - b. Sends the draft e-newsletters to the SB/SE Communications director for approval by the Chief, Communications and Liaison.
 - c. Inputs and formats the newsletters in the GovDelivery system.
 - d. Sends a test message to a designated reviewer.
- (3) Other SB/SE communication specialists will contribute articles containing content supporting their assigned programs, as appropriate, for these two IRS e-newsletters.
- (4) The e-News editor also serves as SB/SE's liaison for other IRS newsletters listed on the IRS.gov Subscription Services page. Specialist with content for those newsletters should contact the editor.
- (5) The directory listing SB/SE communication specialists' program assignments is on MySB/SE. The Subscription Services page is on IRS.gov (search under Subscription Services).

11.53.2.4.4.5
(04-15-2015)
SB/SE Headliners

- (1) A Stakeholder Partners' Headliner is an article providing news or updates important to IRS stakeholders.
- (2) Headliners are historical data which cannot be changed once issued, and will be archived after one year. Therefore, the communication specialist assigned to the business owner's program should determine whether the information should be incorporated into IRS.gov pages to make the guidance available on a more permanent basis.
- (3) A Headliner should not be about the same topic as a news release unless additional procedural details for tax professionals would be beneficial. In this case, the Headliner should reference the news release and provide the procedural details not provided in the release.
- (4) Communication specialists generally propose topics for Stakeholder Partners' Headliner articles in response to requests surfaced through the Issue Management Resolution System or at a business owner's request.

- (5) The communication specialist assigned to the article works with the business owner to ensure it is topic-specific and conveys appropriate key messages. The specialist may draft the communication for the business owner's approval. If the business owner or designee drafts the Headliner article, the specialist should review and edit the article.
- (6) The business owner should provide the communication specialist with a subject matter expert to provide background information, supporting documentation, and review Headliner drafts.
- (7) The specialist completes the article and secures the business owner's approval on the document clearance form (approval may be required from the functional executive, for example the Exam director or ACA Program Manager), then forwards the draft clearance form to the appropriate branch chief to sign and initiate the approval process: Communications director, CSO director, OS director, SB/SE deputy commissioner and IRS C&L director.
- (8) Once approved, the specialist forwards the article and the clearance form to the communication specialist assigned to coordinate Headliners.
- (9) The communication specialist assigned to Headliners reviews the article, makes any required style edits, posts Headliner information on SharePoint, and prepares a content publishing request to post the Headliner to IRS.gov, usually within three business days.
- (10) The directory listing of SB/SE communication specialists' program assignments is on MySB/SE.

11.53.2.4.4.6
(04-15-2015)

Product Development

- (1) Requests for products such as talking points, fact sheets, PowerPoint presentations, drop-in articles, videos, brochures, etc. will generally originate from the following:
 - a. *Business owner request for outreach* (via the communication specialist who supports the business unit): SB/SE Communications support specialists should continue to develop their own outreach materials to support their communication plans.
 - b. *Employees in outreach-conducting organizations*: Stakeholder Liaison should use the IMRS process to request products. The focus of the request should be on the desired outcome, i.e., education or awareness for a targeted audience, and not the product itself. More information about IMRS outreach product requests and guidance is available at IRM 11.53.2.3.6.5 (3) c).
 - c. *Proactive determination by SB/SE Communications*: Support specialists may develop multiple products to support an issue or initiative, or to facilitate outreach in various ways to varied audiences.
- (2) Primary responsibility for product development continues to reside with the support specialist.
- (3) The support specialist will determine whether any additional business owner or Counsel review/approval is necessary. If additional review is required, the support specialist will secure approvals.

Reminder: If Counsel review is required, the support specialist will use the established process for requesting review through the Communi-

cations project manager, and highlight the changes so Counsel can readily identify the sections needing review.

11.53.2.4.4.7
(04-15-2015)

Commissioner's Talking Points

- (1) SB/SE Communications is responsible for creating talking points for the SB/SE commissioner and deputy commissioner for external events and employee organization events. The SB/SE commissioner's staff creates their talking points for internal events. The designated communication specialist will take the following steps to create talking points:
 - a. Secure background information on the event from designated contacts within CSO Headquarters (CSO HQ) for external events and from Office of Equity, Diversity and Inclusion (EDI) for employee organization events. Background information includes:
 - Event name
 - Event theme
 - Length of speech
 - Topics for speech
 - Presentation format
 - Audience description and size
 - Other participants
 - Any other pertinent information, including issues or concerns specific to the particular group
 - b. Stakeholder Liaison Field (SLF), CSO HQ, and EDI are responsible for expeditiously providing background information about the event to the designated communication specialist, so they can begin drafting talking points and meet planning and preparation deadlines for the executives. If any additional information is needed for external events, SLF or CSO HQ will coordinate a conference call with the designated communications specialist, SLF, CSO HQ and the external stakeholder.
 - c. Refer to points of contact designated for each SB/SE function for timely, accurate, and relevant talking points on requested topics. Some other sources of information for talking points are:
 - PSB 2 SharePoint site, which contains folders with final speeches and content
 - Outreach Initiatives Database
 - d. Forward draft talking points to the SB/SE CSO Director's Office for review no later than two weeks prior to the event date.
 - e. Share final talking points with SLF, CSO HQ and EDI when received from the SB/SE Commissioner's Office.
 - f. Add final talking points and content to appropriate folders on the PSB 2 SharePoint site.
- (2) If requested, designated communication specialist will participate at meetings scheduled by SLF, CSO HQ or EDI to brief the SB/SE commissioner or deputy commissioner about the presentation.

11.53.2.4.5
(04-15-2015)

Social Media

- (1) All social media practices in SB/SE should fall within the guidelines and policy issued by the Communications and Liaison Social Media Branch.
- (2) See IRM 11.1.3, *Contact with the Public and the Media*, regarding current IRS social media policy, IRM 10.8.27, *Information Technology (IT) Security*, regarding Internal Revenue Service Policy On Limited Personal Use Of Gov-

ernment Information Technology Resources, and IRM 6.800.211(4), *Computer Security Requirements*, regarding the prohibition on the use of personal computers to conduct IRS business.

11.53.2.5
(04-15-2015)
**Web Communications
Branch**

- (1) The Web Communications Branch Chief and staff are responsible for the SB/SE intranet, MySB/SE infrastructures and operating environments, the IRS Video Portal and the SB/SE content portions of IRS.gov. The Visual Communications Group within the Web Communications branch is responsible for SB/SE video production.
- (2) Submit all requests for SB/SE intranet sites to the Web Communications Branch Chief for consideration of appropriateness and business purpose. The Web Communications Branch Chief makes the final decision on all requests for SB/SE intranet sites.
- (3) All SB/SE intranet sites must fall under the SB/SE URL structure.
- (4) MySB/SE is the intranet site for the Small Business/Self-Employed Division. MySB/SE is a reader centric site that gives SB/SE employees easy access to tools and resources needed to meet job requirements.
- (5) IRS.gov is the IRS's Internet website and is a major strategic tool that allows the Service more efficiency in fulfilling its mission to help taxpayers understand and meet their tax responsibilities. Use the content management application (CMA) for additional content uploads to IRS.gov. All requests for updates or additions to SB/SE content on IRS.gov should be submitted to the Web Communications team using the Content Publishing Request System
- (6) All requests for updates or additions to SB/SE intranet content on MySB/SE should be submitted to the Web Communications Branch team using the Task Request System.
- (7) This section of the Web Communications Branch IRM contains a collection of Web standards and guidelines. These standards establish rules and parameters and provide guidance for everyone who develops and maintains content on MySB/SE.

11.53.2.5.1
(04-15-2015)
**Roles and
Responsibilities**

- (1) The Web Communications Branch develops and maintains the MySB/SE structure and environment. In addition, the branch establishes and maintains policies and the Web Standards and Guidelines for publishing content.
- (2) The Visual Communications Group (VCG) manager reports to the Chief, Web Communications Branch. The SB/SE VCG is responsible for SB/SE video production. The following is detailed guidance about video production, YouTube, webinars, and video posting.
- (3) The use of videos and webinars across the Service serve as important tools in our efforts to reduce travel costs for training and face-to-face meetings. Our video and webinar efforts are a great resource as we produce a variety of internal and external communications that provide training and information for employees, taxpayers and practitioners. However, based on the current budget situation, the Service needs to evaluate all expenditures to ensure they are critical to advancing the Service's mission.
 - Video and webinar requests must be reviewed by the Servicewide Video Editorial Board (SVEB) and receive approval prior to starting production. See

Deputy Commissioner, Operations Support, memos dated February 21, 2013 and March 7, 2013.

- In addition to the SVEB, the business unit head of office, a business unit executive and ultimately the Deputy Commissioner for Operations Support must review and approve video and webinar projects prior to starting production.
- Freelance video production is prohibited. Simply put: the only people authorized to make IRS video for any reason are those in the SB/SE Video Communications Group or the C&L Corporate Television Studio. If you have any questions, contact the VCG manager.
- Video covered by this policy include training and education videos, webinars, vignettes, videos for external placement on YouTube, IRS.gov and related web sites, and any other ad hoc taping or photography projects done by either IRS or contractors. Simple leadership messages to employees are exempt from needing SVEB approval.

- (4) An IRS YouTube video must be short, compelling, simple, helpful, and professional. Good topics for YouTube video will have wide appeal among the general public.
 - YouTube videos are shot at the IRS TV studio in New Carrollton.
 - When considering a YouTube video topic, review the IRS YouTube channel to make sure the topic has not already been covered. Also, VCG can do a quick check with Communications & Liaison to ensure the topic is acceptable. An online VCG project request form must be completed and approved.
 - All YouTube scripts begin by saying "HERE'S A TIP FROM THE IRS. (one second pause) HI... I'M (FIRST NAME) AND I WORK FOR THE INTERNAL REVENUE SERVICE." Do not deviate from this. And most YouTube scripts will end with, "FOR MORE INFORMATION. GO TO WWW.IRS.GOV." The VCG manager can provide a template for YouTube scripts.
 - In addition, text should be in all caps and double-spaced and each sentence must be its own paragraph. Each paragraph must be indented five spaces; commas are expressed as ellipses; acronyms are expressed in broadcast style with hyphens separating the letters, i.e. (A-C-A or O-I-C). The title can be no more than 60 characters, including spaces; the tags can be no more than 120 characters, including spaces -- in the tags section, take out the spaces after commas.
 - After the video is shot and edited, the YouTube client and C&L reviews it again before it is captioned and posted. Post-production takes two to three weeks. The IRS has its own YouTube channel. On the IRS YouTube channel is a Small Business playlist where most SB/SE YouTube videos are posted.
- (5) A webinar is a presentation or classroom-type lecture transmitted over the Web. In SB/SE, webinars are used to reach tax practitioners or small businesses with important outreach topics.
 - All webinar topics must be submitted through the CSO Webinar Planning Team for approval. An online VCG project request form must be completed 12 weeks prior to the event and approved by the VCG manager.
 - The Communication specialist should advise the production manager ASAP if the client is requesting Continuing Education credit for webinar attendees. The production manager will work with the communication specialist to complete Form 8498, Continuing Education Provider Application and Request for Provider Number and submit it to the IRS Return Preparer Office for approval and assignment of a provider number.
 - The webinar interface is a dual screen with video or audio (talking head and perhaps b-roll or a still image) on the left and a PowerPoint presentation on

the right. A script and PowerPoint presentation need to be submitted to the production manager. The PowerPoint needs to help reinforce key items that are mentioned in the script. The PowerPoint must be 508 compliant and very simple. Also, a short description of the webinar topic and a picture with a short bio of the presenter(s) needs to be provided with the script.

- The length of a webinar script can be anywhere from 20 minutes to one hour, which can include the Q&A session. The Q&A session is conducted live on the same day the webinar airs. The Q&A session is an online process that can be done remotely. The recording session for a webinar takes about three to five hours to complete.

- Webinars are archived on the IRS Video Portal website for later viewing. This process takes approximately three weeks from the original broadcast date.

- (6) Posting a video on an external or internal web site is completed only after video the client submits a request to the VCG database and the request is approved by the VCG manager. Internal videos are linked or embedded on specific locations on the IRS intranet under each operating division. External videos are posted on the IRS YouTube channel or the IRS video portal.
 - All videos posted on MySB/SE and/or IRS.gov must meet the specifications listed on the VCG database home page.
 - If the video file is too large to be sent as an attachment in an email, contact VCG.
 - A text transcript of the video is required and must be submitted as a Word document (DOC) or Text file (TXT). All submitted transcripts must be edited, reviewed, and technically correct before posting. Unedited transcripts will be returned to the submitter.
- (7) Visual communications projects place specialists in a number of different roles to coordinate the process of creating a multimedia product. The following is a brief description of key roles:
 - **Functional coordinator** - The person or function requesting multimedia services through the communication specialist. The functional coordinator is the communication specialist's client. For example, a Collection or Exam specialist would be a functional coordinator.
 - **Communication specialist** - The SB/SE Communications specialist providing communications support to a particular function. The communication specialist is the production manager's client.
 - **Production manager** - The person the VCG manager assigns to provide overall coordination of the multimedia project. The production manager is the TV producer's client.
 - **TV producer** - The person IRS Corporate TV assigns to coordinate the technical aspects of the production.
 - **Webinar outreach manager** – an SL who coordinates outreach regarding a webinar. This person works with the VCG, production manager and communications specialist to ensure appropriate promotion for the webinar. This person also ensures awarding of CE credit as appropriate
- (8) The Web Communications Branch assigns contributor and editor permissions using information provided by the MySB/SE content board members, program managers, or program executives. Anyone granted authoring rights on MySB/SE must attend a training session and must self-certify they have reviewed and understand all policies covered in the MySB/SE Web Standards and Guidelines before access privileges are granted. Contributors and editors self-certify by sending an email to the managing editor of MySB/SE.

- (9) SB/SE Web Communications Branch will remove the access rights of anyone who consistently ignores or circumvents the MySB/SE Web Standards and Guidelines, templates, or established architecture.
- (10) Content providers must attend "Writing for the Web" training prior to posting content on MySB/SE. It is highly recommended that content providers attend other Web publishing training as well.
- (11) Web Communications provides Contracting Officer's Representative support for Web Communications contract.

11.53.2.5.2
(04-15-2015)
**SB/SE Multimedia
Production**

- (1) The SB/SE Communications Division is responsible for supporting the multimedia needs of SB/SE functions. Support includes developing videos for training and executive messages, other audio-visual needs, and webinars for outreach that further SB/SE's mission and goals.
- (2) Communications staff works with SB/SE functional staff to develop a concept, script, and production schedule for each project. Most video projects require coordination with IRS Corporate Television.
- (3) There is a centralized fund for audio-visual production within CSO to pay for production of videos, webinars, and audio projects for all SB/SE components. (Webinar streaming is funded by a separate contract and webinar topics are subject to approval from the CSO Webinar Planning Team.)
- (4) Video projects require sufficient time to allow for planning, scripting, shooting, and post-production work. . Ideally, video and webinar projects should be included in the overall communication plan for each function to ensure adequate funding. VCG may have difficulty obtaining funding for a project that is not in the overarching plan at the beginning of the fiscal year. Therefore, it is important that clients meet with Communications staff early in the project to allow enough time for a quality production. Acceptable planning times range from about two months to five months, depending on the complexity of the project.
- (5) A fairly new video option is the use of Captivate software to produce presentations with audio, video and slide content at little or no cost. Typical Captivate projects would demonstrate filling out a form or navigating a website. Customers interested in this option should contact the VCG manager for more information.

11.53.2.5.3
(04-15-2015)
**Printing and Publishing
Process**

- (1) The VCG is the liaison with Publishing Services for all CSO printing requests including outreach products.
- (2) Publishing Services manages the Service's printing, design and publishing requirements. Publishing assists in the planning, producing, and procuring of all print and media products used by the public.
- (3) A communication specialist whose client expresses a need for a printed product should contact the VCG to discuss the product, design services, cost estimates, due dates, and distribution patterns. Before taking any publishing action, the client must complete Form 1767, Publishing Services Requisition.
- (4) The specialist or client should email Form 1767 to the assigned Visual Communications specialist for approval and signatures.

- (5) The VCG specialist will forward the Form 1767 to the printing specialist in Publishing Services assigned to CSO for action.

11.53.2.5.4
(04-15-2015)
New Carrollton Copy Center

- (1) The New Carrollton Copy Center can handle most low to moderate volume copying and duplicating needs.
- (2) For photocopying requests, the specialist needs to complete Section C of Form 1767 and email along with the file to the VCG specialist for action.

11.53.2.5.5
(04-15-2015)
Branch Chief and MySB/SE Managing Editor

- (1) **Role:** The Web Communications Branch Chief and the MySB/SE managing editor make final determinations on content appropriateness, format issues, style, grammar, picture/graphic layouts, and more for the entire SB/SE intranet site. The Web Communications Branch Chief and the MySB/SE managing editor may make changes to any content on the SB/SE intranet as needed, and will consult with content owners about such revisions or changes
- (2) **Responsibilities:**
- Providing the technology that allows Communications and others to publish Web content related to news events, information, guidance, and procedures for SB/SE employees
 - Processing requests for Web services
 - Determining the overall look and feel of the SB/SE intranet
 - Developing and maintaining the SB/SE intranet structure, technology and environment, new functional development and Web site enhancement
 - Establishing and maintaining policies and the standards and guidelines for publishing content to MySB/SE
 - Working closely with communications specialists and Content Board members to promote effective and efficient use of MySB/SE and Share-Point
 - Monitoring content on MySB/SE to help ensure its quality and integrity
 - Taking appropriate actions to resolve content issues that can reflect negatively on the SB/SE intranet
 - Ensuring content providers develop accessible web content and provide resources and links to IRS-level 508 compliance resources
 - Creating, maintaining, and developing Web applications
 - Serves as the IRS.gov Content Area Administrator for all SB/SE public web content. See IRS.gov Content Management Guidelines IRM 2.25.101, *Web Services - IRS.gov Content Management Guidelines* for additional information
 - Coordinating with the Office of Privacy Policy and Compliance within the Office of Privacy, Governmental Liaison and Disclosure to ensure privacy provisions are incorporated into IRS.gov and SB/SE intranet content management and operations

11.53.2.5.6
(04-15-2015)
Contributors, Editors, and Copy Editors

- (1) **Roles:**
- Contributors have the ability to add and edit content and can move the content into pending status for review by editors. They should review the content and ensure correct spelling, proper grammar, check for errors of facts, and conformance with MySB/SE Web Standards and Guidelines.
 - Editors have the ability to add, edit, review, and approve (or decline) the content. They are responsible for the review of any content put into pending status by contributors they work with.

(2) Responsibilities:

- Adding their content directly to MySB/SE
- Maintaining (edit, revise, and delete) their MySB/SE content throughout its lifecycle
- Understanding and applying the MySB/SE Web Standards and Guidelines
- Determining whether content is still relevant or should be archived as content approaches its expiration date. Publishing appropriate content using established MySB/SE templates, structures, and processes
- Serving as point of contact for requests to have content published within their respective content sections
- Ensuring that content published within their respective word sections is accurate, current, and approved for release
- Maintaining a working knowledge of Section 508 guidelines and accessibility resources available such as Information Resources Accessibility Program
- Responding to content questions or comments submitted through any MySB/SE feedback channel

**11.53.2.5.7
(04-15-2015)
Content Board****(1) Roles:**

- The Content Board maintains division-wide coordination on content management, message presentation, and infrastructure enhancement so that the SB/SE intranet is managed as a unified site aligned with the division's priorities
- The Content Board provides the division's functions with a forum for interaction and coordination for Web-related business. It is a mechanism for communicating with SB/SE Web Communications Branch and Communications on cross-organizational issues. The Board also encourages an exchange of ideas and concepts so the best methods and practices are shared throughout the organization. Members champion the effective use of the SB/SE intranet and IRS.gov throughout their business units

(2) Responsibilities:

- Working with contributors and editors to formalize processes, roles, and workflows used by their business units for publishing content on MySB/SE
- Promoting the integrity of the content management structure and enforcing its processes, standards and guidelines throughout their organization's Web page.
- Providing feedback to Web Communications relative to content management and message presentation processes, policies, and procedures on MySB/SE
- Working with their MySB/SE contributors and editors to market their services within their organizational unit
- Certifying their business unit's content is reviewed and validated as current and relevant
- Communicating key intranet and Internet-related information to their executives and representing their executives' interest to the board
- Working with their content contributors and editors to ensure their business unit is adhering to the My SB/SE Standards and Guidelines as well as any internally developed procedures
- Providing leadership and resolving any issues or needs pertaining to their business unit's web content
- Reviewing, approving (or rejecting) their organizational requests that are submitted through the Task Request System

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