



MANUAL TRANSMITTAL

Department of the Treasury
Internal Revenue Service

11.55.2

NOVEMBER 6, 2023

EFFECTIVE DATE

(11-06-2023)

PURPOSE

- (1) This transmits revised IRM 11.55.2, Wage and Investment (W&I) Communications & Liaison (C&L).

MATERIAL CHANGES

- (1) IRM 11.55.2 - Replaced the W&I C&L Mission with Program Scope and Objectives, and added authority section to the internal controls.
- (2) IRM 11.55.2.2.5 - Replaced W&I C&L Planning Groups with Program Controls.
- (3) IRM 11.55.2.8.1.2(2) - Removed Form 1767 here and throughout this IRM.
- (4) IRM 11.55.2.9.2(2) - Removed the second paragraph.
- (5) IRM 11.55.2.13.1.1(4) - Removed webmaster directions a, c, and d.
- (6) Editorial changes made throughout this IRM for clarity. Reviewed and updated plain language, grammar, titles, IRM references, and website addresses.

EFFECT ON OTHER DOCUMENTS

IRM 11.55.2, Wage and Investment (W&I) Communications and Liaison (C&L) dated March 18, 2021, is superseded.

AUDIENCE

W&I C&L employees and all W&I employees who need communications support.

RELATED RESOURCES

- (1) IRM 11.1.1, Communications, Introduction.
- (2) IRM 11.1.3, Contact with the Public and Media.
- (3) IRM 11.1.4, Content Policies and Standards for Intranet Sites.
- (4) *W&I Communications & Liaison* intranet website.
- (5) *W&I Internet Content Publishing Process*.

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11.55.2

Wage and Investment Communications and Liaison

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11.55.2-1 W&I Communication Vehicles

11.55.2-2 Filing Season Readiness Certificate

11.55.2.1
(11-06-2023)
Program Scope and Objectives

- (1) **Purpose:** The purpose of this IRM is to offer direction on how to provide top-notch communication services to both internal and external clients of the W&I division, always ensuring a professional approach.
- (2) **Audience:** W&I Communications & Liaison (C&L) managers and employees, and W&I functions who need communications support.
- (3) **Policy Owner:** Director, W&I, C&L.
- (4) **Program Owner:** W&I, C&L.
- (5) **Primary Stakeholders:** All W&I functions.
- (6) **Program Goals:** We aim to assist the W&I division in attaining its business objectives overall by implementing a comprehensive approach to internal and external strategic communications that focus on delivering tangible outcomes and promoting organizational cohesion.

11.55.2.1.1
(03-18-2021)
Background

- (1) W&I C&L operates within the W&I division, focused on communication and liaison activities. Although embedded within W&I, it collaborates closely with the IRS C&L organization to ensure a coordinated approach to communication efforts.

11.55.2.1.2
(11-06-2023)
Authority

- (1) IRC 7803(a)(2)(A)(iii), which requires the IRS Commissioner to ensure that taxpayers are provided with "accurate and clear explanations" of the laws and procedures related to the administration of the tax code.
- (2) IRC 7803(d), which authorizes the IRS Commissioner to establish a "taxpayer education and communication program" to help taxpayers understand their rights and responsibilities under the tax code.

11.55.2.1.3
(11-06-2023)
Responsibilities

- (1) The Director of W&I C&L serves as the key liaison between the W&I Commissioner and the W&I C&L organization, ensuring that business objectives are translated into effective communication strategies and activities.
- (2) Group managers within W&I C&L report directly to the director and oversee internal and external communication efforts within their respective groups.
- (3) Communications analysts within W&I C&L report directly to their group managers and work closely with their assigned business clients to develop and execute communication strategies and plans that align with their goals.
- (4) W&I campus communicators are responsible for covering local events and developing content and layout for various communications most often geared toward the campus employee communities where they work.

11.55.2.1.4
(11-06-2023)
Program Management and Review

- (1) Evaluating progress with Quarterly Operations Reviews.
- (2) Commissioner updates and Business Performance Reviews every quarter.
- (3) Monitoring the performance objectives and metrics of our functional customers.

11.55.2.1.5
(11-06-2023)

Program Controls

- (1) W&I C&L must approve access requests to the Content Management Request (CMRS) for content updates to IRS.gov.
- (2) W&I C&L must approve all BEARS requests seeking authority to update intranet content.
- (3) W&I C&L approval is necessary for any request to change or establish a new e-mail distribution list or shared mailbox. W&I C&L coordinates with IT to ensure all requests follow a required naming convention.
- (4) W&I C&L maintains and controls access to its shared drive, which stores and shares documents within the function. W&I C&L submits requests on behalf of W&I to the IRS Servicewide Video Editorial Board (SVEB), which oversees development and standards for video across the IRS, reviews all video projects planned throughout the IRS intended for internal and external audiences, considering cost, topic, and tone. A W&I C&L senior analyst serves on the SVEB working group conducting preliminary requests reviews. The W&I Director serves on the SVEB Executive group that reviews and approves all requests from across the IRS after they are reviewed and recommended for approval by the SVEB working group. More information is available at *Servicewide Video Editorial Board*.

11.55.2.1.6
(11-06-2023)

Acronyms/Definitions

- (1) This table lists the acronyms used throughout this IRM section.

Acronym	Definition
AP	Associated Press
BEARS	Business Entitlement Access Request System
C&L	Communication and Liaison
CMRS	Content Management Request System
DL	Distribution Lists
GAL	Global Address
FSR	Filing Season Readiness
IRC	Information Resources Coordinator
JPEG	Joint Photographic Experts Group
MB	Megabytes
NPL	National Public Liaison
NERD	Nationwide Enterprise Resources Domain
OLS	Online Services
SVEB	Servicewide Video Editorial Board
TIFF	Tag Image File Format

- (2) Definition of Media includes:

- a. **Traditional Media** - TV, radio, newspapers, magazines, newsletters, and other print publications.
- b. **Social Media**- websites and applications that enable users to create and share content or to participate in social networking such as Facebook, Instagram, Twitter, YouTube, etc.

11.55.2.1.7
(11-06-2023)
Related Resources

- (1) IRM 11.1.1, Communications, Introduction
- (2) IRM 11.1.3, Contact with the Public and the Media
- (3) IRM 11.1.4, Content Policies and Standards for Intranet Sites
- (4) *Form 14044*, W&I IRS.gov Content Publishing Request (CPR)

11.55.2.2
(09-12-2008)
Roles & Responsibilities

- (1) The Director, W&I C&L is responsible for the W&I communications program.

11.55.2.2.1
(11-06-2023)
W&I C&L Planning Groups

- (1) W&I C&L works closely with our clients to understand their unique business needs and objectives. By providing strategic and tactical communications planning, we develop custom products that align with our client's goals and help them achieve success.
- (2) As part of our approach, we collaborate with IRS C&L functions that maintain various outreach channels. By leveraging existing communication and outreach channels, we maximize the effectiveness of our efforts and ensure our clients' messages reach their intended audience.

11.55.2.3
(09-12-2008)
W&I C&L Administrative Processes

- (1) This subsection provides guidance on administrative processes and specialized tools used by W&I C&L personnel.

11.55.2.3.1
(07-02-2018)
W&I C&L Shared Drive

- (1) The W&I shared drive gives W&I C&L communicators the ability to share business-related files, documents, photos, etc. The Atlanta Nationwide Enterprise Resource Domain (NERD) server houses the W&I C&L shared server.

11.55.2.3.1.1
(07-02-2018)
Shared Drive Roles and Responsibilities

- (1) All W&I C&L communicators with access to shared drive folders are responsible for file maintenance and housekeeping. Typically, the subject folders should not contain more than 500 MB of information each.

11.55.2.3.1.2
(11-06-2023)
General Guidelines for Shared Drive Use

- (1) The purpose of the shared drive is to share business information. W&I C&L communicators must:
 - a. Avoid posting original files or documents on the shared drive, and instead post copies of these items.
 - b. Utilize the shared drive for current documents rather than using it as a long-term storage solution.
 - c. Place files on the shared drive at any time as needed.
 - d. Share any necessary business-related files, including videos, documents, photos, newsletters, and other relevant materials.

- e. Post to the shared drive by copying and pasting files or utilizing the drag-and-drop feature to move files to the appropriate folder.

11.55.2.3.2
(07-02-2018)
**E-mail Public
Distribution List (DL)
Systems**

- (1) W&I C&L is responsible for approving the creation of all Distribution Lists and Shared Mailboxes needed by W&I employees and functions. A Distribution List (DL) is a group of e-mail addresses established to facilitate frequent communication with an identified group(s). The DL allows an e-mail originator to quickly send a message to a group without individually entering employee e-mail addresses. The number of people with permission to use a DL is limited in some cases.
- (2) All DLs and shared mailboxes are created with IT support and the W&I Point of Contact.

11.55.2.3.2.1
(07-02-2018)
**Location of Distribution
Lists**

- (1) DLs and shared mailboxes reside on the Global Address List (GAL) in Outlook. The GAL section is accessible to all IRS e-mail users.
- (2) Outlook users can identify the members and the DL owner of a DL by double-clicking the desired list and looking in the "Members" box.
- (3) Those authorized to send a message to a particular DL are in the GAL under a separate list named Send to W&I name of DL. Those authorized to view the contents and the DL owner of a shared mailbox are in the GAL under a separate list named Access To W&I name of mailbox.

11.55.2.3.2.2
(07-02-2018)
**Distribution List and
Shared Mailbox Format**

- (1) DLs mirror the W&I organization chart. W&I and its functions have established DLs for all employees, all managers, and all executives in their functions.
- (2) All new W&I DLs must begin with "&W&I". All shared mailboxes within W&I must begin with ***W&I**.
- (3) DLs should be defined in the "Notes" section of each DL. The "Notes" section should include a cross reference of who has permission to use the DL.

11.55.2.3.2.3
(09-12-2008)
**Distribution List
Ownership**

- (1) The DL owner is responsible for list maintenance as follows:
 - a. Turbo/Automatic DLs are based on organization codes and populate automatically through personnel actions (PARs) generated through HR Connect and require virtually no maintenance
 - b. The DL owner manually populates manual DLs.
 - c. New DLs that replace old DLs require the deletion of the old DL

11.55.2.3.2.4
(11-06-2023)
**Requesting Support for
a new Distribution List
or Shared Mailbox**

- (1) Contact the Point of Contact (POC) at *W&I C&L Organizational Mailbox or Distribution List Requests*.
- (2) The POC coordinates DL and shared mailbox development with IT.

11.55.2.3.3
(07-02-2018)
Record Retention

- (1) W&I C&L produces various materials for both external and internal audiences, which must be maintained and disposed of in accordance with established practices as mandated by federal laws, executive orders, and agency procedures. IRM 1.15.1, The Records and Information Management Program, and IRM 1.15.1.3.5, Responsibilities of the Information Resources Coordinator (IRC), provide additional information on this matter.
- (2) The IRC requires W&I C&L to submit various communication products, such as:
 - Talk Points and Fact Sheets delivered to National Office Media Relations
 - Newsletters (whether hardcopy or electronic)
 - Published photographic images
 - Speeches prepared by W&I C&L
- (3) However, communication products from outside W&I C&L do not have to be submitted by communicators.

Example: W&I C&L communicator creates a news release subsequently issued by Media Relations. Media Relations, not W&I C&L, is responsible for record retention.

11.55.2.4
(11-06-2023)
**Working with Other
C&Ls and Relationship
Managers**

- (1) W&I C&L communicators may need to work with communicators in other C&Ls or relationship managers when:
 - a. An issue needs to be communicated to employees outside W&I
Example: Media and Publications (M&P) is recruiting employees across the Service to participate in product focus group sessions.
 - b. An issue needs to be communicated to audiences owned by another function or division
Example: W&I needs to communicate Earned Income Tax Credit (EITC) information to the tax professional community, an audience which National Public Liaison (NPL) and Stakeholder Liaison support.
 - c. An issue needs to be communicated through non-W&I corporate-owned communication channels
Example: W&I needs to communicate with congressional offices through the Congressional Update, managed by C&L
 - d. Other C&Ls need to reach W&I employees or audiences through W&I-owned communication channels
Example: W&I employees need information about changes in their leave and earnings statements.

11.55.2.4.1
(09-12-2008)
**Engaging Other
Communicators and
Relationship Managers
on W&I-owned Issues**

- (1) W&I C&L communicators should engage other communicators and relationship managers early in the planning process to prevent overlaps or disconnects in communications and to fully leverage the knowledge of their audience's perceptions, behaviors, communication needs, etc., and potential communication vehicles.

- (2) W&I C&L communicators identify the appropriate C&Ls and relationship managers and advise their W&I C&L manager that outside participation will benefit communications.
- (3) W&I C&L managers contact the appropriate function(s) and request a representative(s) be assigned to the project.
- (4) Consider including the following other C&L and relationship managers (but not limited to):
 - W&I Stakeholder Partnerships, Education & Communication (SPEC)
 - Stakeholder Liaison
 - Governmental Liaison
 - Legislative Affairs
 - National Public Liaison
 - Media Relations
 - Taxpayer Advocate Service
 - Internal Communications

11.55.2.4.2
(07-02-2018)
**Assisting Other
Communicators with
non-W&I-owned Issues**

- (1) The W&I C&L Director and their subordinate managers will serve as the primary point of contact with media relations on all W&I issues.
- (2) When contacted by another C&L function for support, W&I C&L managers secure the pertinent information for proper assignment.
- (3) When W&I C&L communicators receive requests for support from another C&L function, they secure and elevate the pertinent information to the W&I C&L managers for proper assignment.
- (4) W&I C&L managers consider existing client relationships but seek volunteers for new assignments whenever possible.

11.55.2.5
(11-06-2023)
**Communication
Planning**

- (1) Strategic communication planning helps W&I C&L meet its goal of supporting W&I's strategic objectives. W&I C&L works with clients to plan, develop and set expectations for communications that best meet the client's business objectives. W&I C&L coordinates product development for its clients to ensure planned communications are integrated and delivered through the right channels, at the right time, and to the extent possible, and outcomes are measured and reported.
- (2) Communication planning typically includes five significant steps:
 - a. Preparing to meet with the client
 - b. Meeting with the client
 - c. Completing the plan
 - d. Implementing the plan
 - e. Monitoring the results

11.55.2.5.1
(09-12-2008)
**Preparing to Meet with
the Client**

- (1) Before the initial client meeting, W&I C&L communicators should:
 - a. Research available resources to learn about the client, including their strategic objectives and goals
 - b. Talk to subject matter experts (SMEs) to determine significant issues and previous approaches used to resolve issues
 - c. Confer with other communicators who have worked with the client

- d. Identify linkages in W&I's Operations Plan that specifically apply to the client
- (2) W&I C&L communicators should formulate questions to pinpoint the client's desired results, organize questions to flow logically, and review questions with other communicators or SMEs to refine the client discussion.
- (3) W&I C&L communicators should be prepared to explain W&I C&L services.

Example: Provide communication strategy successes, the benefits of strategic planning, the value of stakeholder engagement, etc.

11.55.2.5.2
(09-12-2008)
Meeting with the Client

- (1) W&I C&L communicators set the tone by moving toward results-oriented planning. Establishing and following an agenda for client meetings supports this objective.
- (2) During the client meeting, W&I C&L communicators must:
 - a. Ascertain the client's desired outcome because of communication – how the end state will differ from the current state
 - b. Determine who the key internal and external stakeholders are
 - c. Help the client determine the appropriate target audience(s)
 - d. Gather information and conduct a strengths, weaknesses, opportunities, and threats (SWOT) analysis
 - e. Refrain from commenting on policy issues; this is not the communicator's area of expertise
 - f. Ask numerous clarifying questions up-front to prevent miscommunication
 - g. Determine if research exists on the client's issue
 - h. Request a subject matter expert assigned to the project
 - i. Discuss product clearance responsibilities and contacts; ensure the SME knows they are responsible for ensuring any needed Counsel review
 - j. Listen closely to the client to ensure clarity regarding crucial components of the plan

11.55.2.5.3
(09-12-2008)
Preparing a Communication Plan

- (1) Communication plans can have various degrees of detail, ranging from an in-depth communication strategy to a simpler Awareness Plan. W&I C&L communicators determine the type of plan needed for the initiative at hand. Awareness Plans inform the audience without the expectation of an action or change in behavior. Communication Strategies have specific expectations and seek to meet specific objectives. See Exhibit 11.55.2-1, W&I Communication Vehicles.
- (2) To show how a specific communication plan supports the W&I business objectives, communicators should work with the client to tie their plan to the W&I Operations Plan.
- (3) A communication plan should identify all internal and external audiences for whom messaging is appropriate. W&I communications often contain messages intended for W&I employees and managers. Communication plans also may include other internal audiences or an external communication component. Potential external audiences can include:
 - Tax professionals
 - Members of Congress (field offices or committee members)
 - The media and the public

- Other stakeholder groups (engagement prior to communications may be needed)
- (4) Once communicators identify all audiences, they must develop the tactical portion of their communication plan to outline the appropriate communication vehicles and products for message delivery. Communicators often develop multiple products. Options range from hard copy distributions to Web postings and e-mail. Communicators should also consider and leverage non-W&I channels and vehicles if the audience is broader than W&I.

Note: Most IRS employees have Intranet and e-mail access. However, almost 50 percent of W&I's employee base is campus-based and within this audience, regular access to electronic media is minimal for some departments. Paper product development and distribution may be necessary.

- (5) W&I C&L communicators work with the client to identify specific measurable behaviors needed to achieve the desired business objectives that can be driven by communications.

Example: If a plan promotes the electronic signature option you might compare the percentage of taxpayers with electronic signatures for one year versus the next year. Communicators then work with the client to determine the systems, tools and processes that best measure results.

For detailed information see IRM 11.55.2.5.5, Business Measures.

- (6) Communicators determine if the communication need is one-time or if it will recur and on what basis.

Example: Some needs are updated each filing season. Communicators determine timeliness/deadlines and gain agreement with the client on a time frame for each objective.

- (7) The W&I C&L communicators consult with the appropriate SME for technical assistance before finalizing any plan to ensure the accuracy and completeness of the information.
- (8) Communicators must obtain appropriate approval from the client and the communications manager before the communication plan can be considered final.
- (9) Communicators must post approved communication plans to the W&I Communications & Liaison Communications Strategies SharePoint *W&I Communications and Liaison Communications Strategies SharePoint*.

11.55.2.5.3.1
(09-12-2008)

Components of a Communication Plan

- (1) This sub-section describes what should be included when completing the communication table.
- **Objectives and Measures:** Defines how planned communications will help meet the business objectives
 - **Strategy:** Summarizes the strategic approach (i.e., how the communicator and client will accomplish the goals of the plan)
- Example:** Create general awareness among all employees. Use stakeholder relationship managers to educate partners and promote participation.

- **Audience:** Lists each audience, segmented into the smallest groupings possible (if the audience is not all W&I employees, then list the target W&I organizations – Accounts Management, Field Assistance, etc.)
- **Message(s):** Shows the most powerful, persuasive benefit(s) to each audience, and should be phrased in action statements

Example: Check out the redesigned Innocent Spouse form and tell us what you think.

Example: Make quality a group effort, using Contact Recording as a tool.

- **Communication vehicle:** Lists the vehicles that will carry the communications (i.e., e-mail distribution list, external media outlets, employee newsletters, Intranet sites)
- **Communication Product:** Lists the product that will be used (i.e., article, news release, frequently asked questions, flyer)
- **Communication activity:** Describes the communication activity (i.e., announce Revenue Procedure changes to various audiences)
- **Communication Strategy Team:** Lists individuals contributing to the strategy development, including representatives from the client organization, other C&Ls, and relationship managers
- **Communication Plan Creative Development and Implementation Team:** Lists individuals responsible for creative development and implementation (this team may also contain representatives from the client organization)
- **Addendum:** Components on the addendum can be used as needed to enable the development and execution of the plan

Note: All components may not be applicable to all communication strategies and awareness plans.

11.55.2.5.4
(09-12-2008)
**Monitoring and
Managing the Plan**

- (1) W&I C&L communicators manage and monitor their assigned awareness plans and communication strategies on behalf of their clients. To do so, communicators should take these and any other applicable proactive measures throughout plan delivery. Adjustments may be made as necessary:
 - a. Monitor action items to ensure they meet the client's objectives
 - b. Determine whether the messages remain on-target
 - c. Ensure all audiences are incorporated, and add/remove as necessary
 - d. Monitor audience feedback, report to the client and adjust as needed
 - e. Monitor the audience's reaction(s) to the message – including adverse reactions and questions about new or revised procedures; address the reaction(s)
 - f. Maintain contact with the client to determine whether their communication needs are being met
 - g. Monitor the measures to determine plan effectiveness
 - h. Provide subsequent plan versions to the client as actions are completed and other updates are necessary
 - i. Post updated awareness plans and communications strategies to the W&I C&L Communication Strategy Web page
- (2) Communicators can increase their value by educating themselves about the client's business, anticipating needs, and making themselves available for regular consultation.

- (3) In preparing to meet and share results with the client, W&I C&L communicators must prepare a close-out agenda or quick overview of the project to include plan highlights, deliverables, and discussion of the measured communication results. Ideally, the client will share the business and behavioral measured results now.

Note: If this is an interim (milestone) results meeting, communicators must be prepared to present options to enhance results and discuss the possible implications of each.

11.55.2.5.5
(09-12-2008)

Business Measures

- (1) Business (or client-driven) measures are often quantitative because the client has existing baseline data and can measure what they want the target audience to do, such as increase their use of e-file.

Example: Increase taxpayer use of Free File.

11.55.2.5.6
(09-12-2008)

Communication Measures

- (1) W&I C&L communicators must link communication objectives to W&I and IRS strategic business objectives and results. In its strategies, W&I C&L may use one or more quantitative or qualitative communication measures.

Example: Quantitative measure - Achieve at least 2.7 million authentications via the "Where's My Refund?" application.

Example: Qualitative measure - Anecdotal information gathered through a focus group or case study analysis.

11.55.2.6
(07-02-2018)

W&I Corporate-Owned Communication Vehicles

- (1) W&I C&L manages W&I's corporate-owned communication channels and is responsible for developing, publishing, and distributing:
- **W&I Offline:** a recurring (approximately nine times annually) all-employee newsletter with corporate and campus-specific information issued in hardcopy (limited quantity) to W&I campus employees and electronically to W&I headquarters, campus, and field staff
 - **The Insider:** The W&I Intranet site with news articles, links to all functions within W&I; friendly reminders of current and upcoming events; Your Neck of the Woods in W&I, featuring employees across the country and activities of local interest across the country; the Insider is available to all IRS employees with Intranet access
 - **Inside the Insider:** a weekly e-mail to all W&I employees with breaking news about initiatives or events and links to related content on The Insider
 - **News from Business Units:** a section of IRWeb that promotes non-location specific W&I news of interest to all IRS employees through a linked headline
 - **W&I Leading Edge Podcast:** a periodic podcast primarily featuring W&I leaders sharing thoughts and insights with W&I employees.
 - All W&I employee e-mail messages
 - Weekly electronic newsletters – available on some Campuses
 - Closed-circuit TV system to promote corporate and local events, available in limited locations

- (2) The purpose of these communication vehicles is to help meet W&I goals by effectively and efficiently disseminating information and messages to targeted W&I audiences or the entire W&I organization.
- (3) Contributors can submit communication items or articles for publication via any W&I C&L staff member using *Requesting our services* link. All articles must have client approval before submission.

Note: All submissions are subject to the editorial guidelines. For more information, see IRM 11.55.2.7, W&I Position Standards.

11.55.2.6.1
(09-12-2008)
W & I Offline

- (1) **W&I Offline** is designed to meet the communication needs of W&I employees without Intranet access.
- (2) The **Offline Editorial Board** meets monthly to discuss and schedule upcoming events and news articles of interest to W&I employees. The board considers various topics and communications are planned using one or all the major communications vehicles, but the primary focus is to outline the content of future Offline issues.
- (3) The W&I Offline editor-in-chief collects, edits, proofreads, and does the layout for the corporate insert pages and forwards them to each campus.
 - a. Campus versions are printed in limited quantity each month with the common corporate insert pages plus local news
 - b. An electronic version is posted online each month for employees on campus as well as headquarters and field offices

11.55.2.6.2
(09-12-2008)
The Insider

- (1) **The Insider** is W&I's Intranet site which features:
 - Links to all W&I functions' web pages
 - News articles about W&I initiatives and activities
 - Friendly reminders of current and upcoming events
 - **Your Neck of the Woods**, activities of local interest across the country

11.55.2.6.3
(09-12-2008)
Inside the Insider

- (1) **Inside the Insider** is a weekly e-mail to all W&I employees.
- (2) It promotes two or three new articles and features several new **Your Neck of the Woods** each week.

11.55.2.6.4
(11-06-2023)
News from Business Units

- (1) The **News from Business Units** is a section of IRS Source. National Headquarters Internal Communications allows business unit communicators posting and content control of one Business Unit News (BUN) item to promote operating division articles or content of interest to the IRS. Each business unit may post a story of their choosing and post it for seven days. Business units have the option to change stories at any time.

11.55.2.7
(09-12-2008)
W&I Publication Standards

- (1) This subsection provides guidelines for producing professional publications that consistently support the W&I mission and strategic plan. Through clear and concise messaging, W&I C&L informs, educates, and influences readers and promotes a better understanding of W&Is goals.

11.55.2.7.1
(11-06-2023)
Writing Format

- (1) W&I C&L follows and adheres to the journalistic standards outlined in the AP Stylebook and additional customized standards set by W&I C&L. For more guidance on format and style, refer to IRM 11.55.2.7.4, Writing References.
- (2) W&I C&L communicators should write and edit all articles and communication products (PowerPoint presentations, posters, flyers, talking points, etc.) using:
 - Active voice
 - Plain, concise, and clear language
 - Simple, strong, sincere tone
 - Bullets and lists
 - Short sentences, short paragraphs, short articles
 - Plenty of white space
 - Shortest significant number for statistics (round off \$1,711,669,356.02 to \$1.7 billion)
 - Inverted pyramid approach for news articles (most important information in the first paragraph)

11.55.2.7.2
(09-12-2008)
Editorial Control

- (1) All W&I corporate-owned communication vehicles exist as instruments to benefit and educate W&I employees and clients. W&I C&L reserves the right to review and reject any materials that are not consistent with IRS or W&I goals and vision, or that do not meet the standards listed above. For more information see IRM 11.55.2.7.1, Writing Format.
- (2) All products submitted to W&I C&L for inclusion in any W&I communication vehicle (Intranet, print, or Internet) must be 508 compliant and are subject to review for grammar, punctuation, clarity, conciseness, active voice, length, timeliness and any other considerations. For more information see IRM 11.55.2.7.4, Writing References.
- (3) W&I C&L does not use animated graphics on its Web site.
- (4) W&I C&L uses photographs that are well composed, in focus, and appropriate for the audience. More information is in IRM 11.55.2.9, Photographic Support.
- (5) Clients are responsible for reviewing and approving all articles for technical accuracy. More information is in IRM 11.55.2.8.2, Communication Product Clearance and Review.

11.55.2.7.3
(09-12-2008)
**Articles Submitted to
W&I C&L for Publication**

- (1) The National Treasury Employees Union (NTEU) may submit articles as agreed upon in the IRS/NTEU contract.
- (2) Employee organizations may submit articles for publication. All articles must be appropriate for federal government employees.
- (3) W&I may print a disclaimer in publications, such as, "The views expressed in this article are not necessarily those of the Internal Revenue Service".
- (4) Articles published will inform and promote the views of the IRS. W&I C&L will not publish articles that might violate the law, subject the IRS to liability or improperly imply Service endorsement of an organization or its views. W&I C&L reserves the right to review and reject any materials inconsistent with IRS or W&Is goals and vision.

11.55.2.7.4
(11-06-2023)
Writing References

- (1) W&I C&L communicators refer to the following resources for writing guidance:
- Publication standards: AP Style Guide
 - *IRS Style Guide*
 - *NTEU/IRS Contract*
 - *IRS Employee Organization Policy*
 - *Plain Language* (Internet access required)
 - *Acronym Guidance*
 - *W&I C&L Toolbox* (Access is limited to W&I C&L staff)

11.55.2.8
(09-12-2008)
Creating W&I Communication Products

- (1) W&I C&L prioritizes creating communication products for communication strategies and plans that directly support the W&I Operations Plan, business objectives, and new legislation.

11.55.2.8.1
(09-12-2008)
Communication Product Development Overview

- (1) W&I C&L attempts to meet all client requests. Management considers/assigns product requests based on an issue's sensitivity, visibility, number of taxpayers or employees affected, and the anticipated return on communication investment.

11.55.2.8.1.1
(09-12-2008)
Source of Communication Product Requests

- (1) W&I clients come to W&I C&L with requests for many different products. Clients make requests for products in several different ways. For example, they might:
- a. Work with an assigned W&I C&L communicator to develop a communication strategy or plan calling for specific products. For more information see IRM 11.55.2.5, Communications Planning.
 - b. Contact a W&I C&L staff member with an ad hoc request for similar support.
 - c. Contact a W&I C&L manager directly with a request.

11.55.2.8.1.2
(11-06-2023)
Fulfilling Product Requests

- (1) Unless specified in an approved communication plan, the W&I C&L communicator and the manager must take several steps before beginning product development, including:
- a. Prioritizing the request against other requests, considering W&I objectives, project visibility, existing workload, etc.
 - b. Identifying the audience
 - c. Determining the client's desired outcome
 - d. Proposing and confirming key messages designed to deliver the desired outcome
 - e. Determining when the client needs the product
 - f. Recommending products that best meet the client's needs

Example: If a business unit needs to communicate quickly with a broad W&I audience, the W&I C&L communicator may determine the most effective product is an article on the W&I Insider or another vehicle.

- (2) The communicator completes these steps and contacts the manager to request the assignment of product creation and design assistance by the appropriate staff. W&I C&L fulfills most requests, but if resident expertise does not exist within W&I C&L or workload limits additional tasks, the manager may

direct the W&I communicator to complete an electronic *Publishing Services Request (PSR)* and ask Publishing Services for assistance.

11.55.2.8.1.3
(07-02-2018)

**Types of W&I C&L
Communication
Products**

- (1) Generally, W&I C&L produces few hard copy products and focuses instead on electronic products such as:
 - Web content
 - New web pages
 - E-mail templates
 - Scripts
 - PowerPoint presentations

11.55.2.8.1.4
(11-06-2023)

**Creating New
Communication
Products**

- (1) The W&I C&L communicator who designs the product delivers one or more sample products or proofs to the W&I C&L project lead communicator who confirms acceptance or forwards comments or changes from the client.
- (2) If the final product requires outside printing, the W&I C&L communicator works with the client and Publishing Services to submit the specifications and a *Publishing Services Request (PSR)* to a vendor. The client is generally responsible for funding any printing costs.
- (3) The client must approve content for any product before the design and layout is started. W&I C&L staff edits all content to conform to AP style, including grammar, punctuation, clarity, etc. More information is found IRM 11.55.2.7, Creating W&I Communications Products.

11.55.2.8.2
(09-12-2008)

**W&I C&L
Communication Product
Clearance and Approval
Process**

- (1) The W&I C&L communication product clearance and approval process ensures that all stakeholders (client, communicator, management, etc.) are involved in each step of the product creation and delivery process.

11.55.2.8.2.1
(09-12-2008)

**Communication Product
Clearance and Approval
Roles and
Responsibilities**

- (1) The client has ultimate responsibility for the technical accuracy of communications products including any necessary Counsel review. W&I C&L clients should assign a subject matter expert (SME) to play an active role in each phase of the product development process, from pre-production through the final clearance stage. All approvals must include reviews from within the appropriate organization and other interested functions prior to W&I C&L implementation.
- (2) The W&I C&L communicator will guide the client through the clearance and review process ensuring all identified stakeholders are in the approval process. The W&I C&L communicator also keeps the client and management informed of any issues that may impact the final product.
- (3) W&I C&L management ensures the assigned communicator has completed the client review and clearance process. Management also alerts W&I C&L communicators to any issues that may impact product delivery, such as the need for additional reviews from a higher level in the organization or from additional offices with a stake in the product's outcome.

- 11.55.2.8.2.2
(09-12-2008)
Additional Communication Product Clearance and Approval Considerations
- (1) The W&I C&L communicator, editor, client and management will play an active role in the review of all internal communication products. All changes made following client approval will be discussed with the originating author/client before publication.
 - (2) Besides management, client, and SME approvals, W&I C&L communicators will consult with outside functions such as Media and Publications, Media Relations, and NPL, to ensure external communication products meet their specific publication and policy specifications. More information is in IRM 11.55.2.8, Creating W&I Communications Products.
 - (3) The functional SME is responsible for any clearance through Counsel.
 - (4) Electronic signatures are used throughout the review and approval process to the maximum extent possible.
- 11.55.2.9
(09-12-2008)
Photographic Support
- (1) This subsection defines consistent standards for digital photography within W&I and the photographic support W&I C&L provides for official events. W&I C&L's priority is capturing photographic images to support W&I corporate-owned communication vehicles.
- 11.55.2.9.1
(09-12-2008)
Guidelines for Taking Digital Still Photographs
- (1) W&I C&L photographers should follow these photography guidelines:
 - a. Check the location to pre-determine background and lighting conditions
 - b. Stage the photo subjects to create the best photograph possible

Example: If an award ceremony is involved, ask to stage the award photos after the ceremony, in addition to capturing the action shots to ensure quality photographs.
 - c. Read the camera manual carefully and practice using the camera before taking it on an assignment
 - d. Shoot several pictures of the subject
 - e. Reduce camera shake when shooting at slow shutter speeds by using the optical viewfinder if available.
 - Note:** Communicators can hold cameras to their foreheads and use their elbows like bipods against their chests to add camera stability.
 - f. Use the camera flash appropriately.

Reminder: Unless you are shooting photos for official record, try to forgo the flash. Start shooting with available light and a steady camera to create photos with depth and feeling. A solid understanding of camera settings will ensure success in this available light environment.
 - g. Compose photos by using tight shots or close-ups avoiding crowd shots where no faces are discernible, and avoiding photographs of backs of heads
 - h. Avoid taking pictures facing into a bright window or having subjects facing the sun

Example: If forced to shoot in a backlit situation, communicators should use the electronic flash on the flash fill setting to brighten the shadow areas.

- i. Select good backgrounds, avoiding white or light-colored walls, unless shooting from an elevated angle and background features such as plants, poles, or columns which could appear to be protruding from a subject's head
- j. Avoid the cliché firing squad pose of subjects standing in a line. Try posing subjects outdoors or with some seated, etc.
- k. Try to shoot action shots since photos that show action or activity tell a story within themselves

Note: These shots will supplement the standard/cliché shots, i.e., grip and grin; someone handing someone else an award; etc.

- l. Avoid one individual in multiple shots

11.55.2.9.2
(11-06-2023)
**Standards for
Web-Based Photography**

- (1) Television and computer monitors display photos at 96 dots per inch (dpi). The following steps are the procedures for editing photos for this medium using Adobe Photoshop (the current common operating environment software):

- a. Open the photo for editing
- b. Select Image from the toolbar and Image Size from the resulting menu
- c. Make sure Resample: Automatic is checked, and the link for Proportions is intact
- d. Set the resolution to 96 pixels/inch – this is the standard resolution for web photos.

11.55.2.9.3
(11-06-2023)
**Resolution Standards
for Print-Based
Photography Using
Digital Cameras**

- (1) Using the Image section on the Adobe Photoshop bar, any image can be re-sized, up or down.

Example: A 16x20 photo at 50 dpi would become an 8x10 photo at 100 dpi.

Print publications require a 300 dpi image, so keep this in mind when re-sizing and storing images.

11.55.2.9.4
(09-12-2008)
**Guidelines for Storing
Digital Photographs**

- (1) The most common format is the Joint Photographic Experts Group (JPEG) file format. This format provides good picture quality and reasonable file size. JPEG is a compressed format that throws away some image data to shrink the file to a smaller size. Most digital cameras offer two or three levels of compression. Cameras with lower compression ratios tend to have cleaner images.
- (2) Storing a JPEG image at its highest quality level results in little degradation. Saving files with maximum compression settings can produce a 90 percent reduction in file size. This flexibility and the universal support for the JPEG standard in Microsoft Windows and on the Web make the JPEG format suitable for almost all applications.
- (3) The format in which images are saved can directly affect picture quality. Using an uncompressed Tag Image File Format (TIFF) file provides the highest picture quality possible at a given resolution because this format stores full-color information for every captured pixel; however, uncompressed images require a large amount of storage space, almost 10 Megabytes (MB) for a single photograph. This significantly reduces the number of images that will fit on an external hard drive. Large files make photos more cumbersome to edit and increase the time it takes to transfer them to a PC or even upload them to the Web.

- 11.55.2.9.5
(11-06-2023)
Sharing/Naming Digital Photographs
- (1) W&I C&L communicators can temporarily store digital photos on external hard drives provided by the business unit. Communicators can share their digital photos on the national shared drive: VPWSENTHRCMN49.ds.irsnet.gov\common.
 - (2) When storing on the national shared drive, communicators should remember to create a file name, label all the photos, and store a copy of photos in their original size. Anyone needing these photos can then download them and create the proper resolution.
- 11.55.2.9.6
(09-12-2008)
Supporting W&I Photography Needs
- (1) Guidelines for photography services provided by Headquarters, Campus, or field offices in IRS publications or other communications vehicles include, but are not limited to:
 - Employee engagement events
 - Official award presentation ceremonies
 - Continuing Education Programs/training events
 - Official photos
- 11.55.2.9.7
(09-12-2008)
Scheduling On-Site Photo Services
- (1) Photo services scheduled in advance receive priority consideration, except in the event of official executive events.
 - (2) Official executive events always have priority. All other events/requests are scheduled as time and resources permit.
- 11.55.2.9.8
(09-12-2008)
Archiving Photos
- (1) W&I C&L communicators are required to retain and archive photographs of senior IRS officials and important events that document the agency's mission.
- 11.55.2.9.9
(09-12-2008)
Requesting Copies of Digital and Hard Copy Photographs from Archives
- (1) Requests for copies of digital and hard copy photographs for official purposes receive priority consideration. Unofficial requests are honored on a case-by-case basis.
 - a. Digital photocopy requests require advance notice
 - b. To access archived photos, a minimum notice of two weeks is required, unless the requestor arranges to personally research the archives themselves.
 - c. Copies of archived photos can't be released without the consent of the local W&I C&L communicator.

Note: At that time, a determination will be made as to whether the photo(s) will be scanned for the requestor, or the original photo can be permanently released.
- 11.55.2.10
(09-12-2008)
Filing Season Planning
- (1) Wage and Investment is a member of the cross-functional Filing Season Readiness Executive Steering Committee (FSR ESC). The FSR ESC provides executive oversight and certifies that IRS operations are in a state of readiness for the upcoming filing season. Because W&I customers comprise the majority of the taxpaying public and are integral to the filing season, W&I C&L takes a leading role in filing season communication planning and implementation, ensuring cross functional integration and support of current year objectives.

- (2) FSR ESC activities generally begin in late spring each year, ending the following January. This subsection identifies the W&I C&L filing season planning process, stakeholders and roles.

11.55.2.10.1
(09-12-2008)

Role of W&I C&L Filing Season Lead

- (1) W&I C&L appoints a Filing Season Lead to direct the filing season efforts. The Lead meets with the W&I C&L Director and senior managers to identify the W&I C&L Filing Season Team. The W&I C&L Lead also:
- Provides direction to the filing season team
 - Provides updates for the FSR ESC meetings and briefings to other officials when necessary
 - Coordinates responses for ad-hoc requests or follow-up information
 - Conducts periodic meetings with internal stakeholders, or the cross functional filing season team
 - Certifies to the W&I C&L Director that W&I C&L is in a state of readiness for the upcoming filing season

11.55.2.10.2
(11-06-2023)

Role of W&I Filing Season Core Team

- (1) The W&I C&L Filing Season Core Team is composed of W&I C&L Communicators, who are assigned to key areas including, but not limited to, CARE, CAS and RICS. Other W&I C&L communicators receive filing season assignments on an as-needed basis.

- (2) The W&I C&L Filing Season Core Team:

- Identifies Servicewide functional stakeholders and a Point of Contact (POC) for each; a cross-functional filing season team is created from this list
- Assigns team members to specific functions or operating divisions, through the W&I C&L lead or senior management, for product/message development and executive concurrence
- Identifies and inventories existing W&I C&L strategic communication plans containing messages/objectives for filing season delivery
- Works with POCs to identify other stakeholder issues and concerns.

Example: (i.e., those that could give rise to possible filing season messages even though not related to an existing W&I C&L strategic communication plan) such as voluntary compliance, SB/SE concerns related to Schedule C filers, or e-services enhancements.

- Works closely with POCs to gather and develop final filing season messages and products, and attains executive concurrence
- Identifies internal and external communication vehicles

Example: Each message/product is labeled for specific or multiple communication vehicles based primarily on the intended audience(s); such vehicles include: IRS Intranet, internal e-mail, IRS.gov, traditional and social media, and other external stakeholder channels.

- Reassesses the Individual IRS.gov web page and prioritization of messages and features
- Plans and implements filing season communications on the IRS Intranet.
- Updates the W&I C&L action items in the Filing Season Readiness Action Plan. Access the plan at: *SP - Filing Season Readiness (FSR) (irs.gov)*

- 11.55.2.10.3
(09-12-2008)
Role of W&I C&L Clients
- (1) To facilitate accurate, timely and targeted publication and dissemination of filing season messages and products, internal organizational stakeholders through their assigned communicator or the W&I C&L filing season lead, identify and approve filing season messages and products based on Operating Division (OD) or functional business objectives. To streamline the process, each OD and function contributes:
- Point of Contact and/or Subject Matter Expert
 - Technical content for products
 - Technical review and approval of products/messages
- 11.55.2.10.4
(09-12-2008)
Filing Season Readiness Certification
- (1) The W&I C&L Filing Season Core Team equips the W&I C&L group managers to certify to the Director, W&I C&L, that the organization is ready for the filing season. The certification date is determined by the Filing Season Readiness Executive Steering Committee, usually a December date, prior to the upcoming filing season.
- (2) The filing season readiness certification includes:
- a. Verifying all W&I C&L action items in the Filing Season Readiness Action Plan are complete or will be completed by their respective due dates
 - b. Sending the Certificate of Readiness to the Director, W&I C&L
- (3) The Director, W&I C&L, signs and forwards the certification to the W&I Commissioner. For an example of this certificate see Exhibit 11.55.2-2, Filing Season Readiness Certificate.
- 11.55.2.11
(09-12-2008)
Incident Management Communications
- (1) W&I C&L supports Crisis Communications and all local Business Continuity Plans by serving as on-site internal and external communications experts, as appropriate. The suite of Business Continuity Plans includes:
- Occupant Emergency Plan (OEP)
 - Business Resumption Plan (BRP)
 - Disaster Recovery Plan (DRP)
 - Incident Management Plan (IMP)
- Note:** There may be other local plans in addition to those listed above.
- 11.55.2.11.1
(09-12-2008)
Incident Management Responsibilities of W&I C&L Communicators
- (1) All W&I C&L staff located in the W&I Headquarters office, post-of-duty offices, or campuses follow and adhere to the duties identified in local plans for incident management communications.
- (2) All W&I C&L staff should have copies of plans for their local area and be familiar with the communicator's roles and responsibilities.
- (3) The specific roles and responsibilities vary, depending on location of incident and availability of communicators from other divisions and functions.
- 11.55.2.11.2
(09-12-2008)
National Incident Management Communications
- (1) Whenever Washington, D.C., is in an emergency status and the Service requires incident management communications, the following are the primary contacts for all communication efforts:
- Chief, Communications and Liaison
 - Executive Officer, Communications and Liaison

- Chief, Internal Communications

(2) W&I Headquarters will be the primary contact for Servicewide communications on behalf of Washington, D.C., if the three listed above are not available, in the following order;

- Director W&I C&L
- Chief, W&I C&L Communication Support Services
- Chief, W&I C&L Program/Outreach Communications

11.55.2.11.3
(09-12-2008)
**W&I Headquarters &
Post of Duty Incident
Management
Communications**

(1) W&I Headquarters and post-of-duty offices will generally be under the guidance of a Senior Commissioner's Representative, who serves as the Incident Commander when an emergency occurs. The primary goal for W&I C&L is to provide communications support identified in the local plan, whether serving as primary or back-up communicator or as a member of the communication team.

11.55.2.11.4
(09-12-2008)
**W&I Campus Incident
Management
Communications**

(1) W&I C&L communicators at campus sites are the primary communicator for the site. The site's incident commander may delegate all communication roles described in the local Business Continuity Plan during an emergency. If the site has more than one communicator, the Incident Commander will assign one of the communicators as the primary and the other as the back-up or work as a member of the communication team. The focus is to provide the necessary communications expertise, advice and support for the emergency. A list of communicators available for emergency purposes at campus sites is located at <https://irssource.web.irs.gov/WI/Lists/CL%20Generic/DispItemForm.aspx?ID=28>.

11.55.2.11.5
(11-06-2023)
**Incident Management
References for W&I C&L
Communicators**

(1) W&I C&L communicators should be familiar with the Occupant Emergency Plan (OEP) Service-Wide Repository, <http://awss.web.irs.gov/FMSS/oep.html>.

11.55.2.12
(09-12-2008)
Internet Support

- (1) W&I C&L is responsible for consistent messaging and assistance to taxpayers via content posted to IRS.gov pages. Designated W&I C&L employees are authorized to input support requests to Online Services (OLS) for content updates.
- (2) W&I C&L achieves message consistency by reviewing and approving most content updates submitted by other W&I functions. Separate Administrative Guidance is available at https://irssource.web.irs.gov/WI/CL/WI_administrative_guidance_IRS.gov.docx.

11.55.2.13
(09-12-2008)
W&I Intranet Support

(1) W&I C&L provides Intranet support, including web page design, maintenance and postings, to W&I functional clients. Assigned W&I C&L personnel, interface with W&I customer organizations which designate content owners as the main points of contact to coordinate postings to the *W&I Insider*.

11.55.2.13.1
(11-06-2023)
W&I Insider Intranet Oversight

- (1) W&I C&L, Communication Support Services oversees the content, style and functionality of all web pages, files and messages associated with the *W&I Insider* web site. Messages include the Inside the Insider weekly e-mail that promotes articles posted on the Insider home page.
- (2) W&I C&L CSS is responsible for:
 - a. Continually analyzing and improving the Insider web site
 - b. Proactively seeking news articles for the Insider home page
 - c. Notifying the Director, W&I C&L, of any postings that may be sensitive
 - d. Responding to user feedback received through various channels including the *W&I Insider* email box
 - e. Troubleshooting technical problems through IT server technicians
- (3) W&I C&L webmasters who:
 - a. Monitor, maintain and update the Insider home page by posting new articles to W&I News, Your Neck of the Woods, Main Alert and W&I Commissioners' Corner
 - b. Continually look for potential news articles
 - c. Identify and elevate Insider web-related issues they feel may be of concern to management
 - d. Monitor and maintain folders and files on the *W&I website* (<https://irssource.web.irs.gov/WI/Pages/Home.aspx>), especially files in the root directory
 - e. Troubleshoot all problems associated with the Insider home page and contact IT server technicians as needed for help with server issues
 - f. Answer questions from users, clients and webmasters and provide consultation to individuals seeking assistance with sub-webs and other web sites
 - g. Research topics as needed to answer questions and solve problems
 - h. Keep abreast of emerging technology and practices that may improve the *Insider* web site
 - i. Maintain W&I articles posted on the IRS Source's Business Unit News section
- (4) Training requirements for webmasters include:
 - Online training for SharePoint Online or the current equivalent Intranet page assembly program.
 - W&I C&L Webmaster Training (classroom or one-on-one with instructor)

11.55.2.13.1.1
(11-06-2023)
Role of W&I C&L Communicators

- (1) The C&L Communicator establishes and maintains positive relationships with content owners. It is important that all W&I C&L staffers interact with all clients in a supportive manner that facilitates the best Intranet experience for site visitors. The assigned W&I C&L Communicator:
 - a. Enters active dialogue with the client at the beginning of the relationship to discover the content owner's vision for their Web page
 - b. Balances content owner expectations with the services that W&I C&L can reasonably deliver. It is important that roles and responsibilities be clarified at the beginning of the relationship to expedite task completion and minimize confusion

Example: Communicators must ensure that content owners understand their responsibility to validate the technical accuracy of all infor-

mation submitted for posting, just as webmasters are responsible for proper posting of information.

- c. Acts as a consultant

Note: W&I C&L Communicators must be knowledgeable in a variety of communications media and use that knowledge as a consultative skill to benefit their client. W&I C&L Communicators strive to deliver the client's message via the most appropriate communications medium and language. Thus, communicators should not hesitate to recommend a change in language or delivery method, etc., to improve the communication process, even if that recommendation excludes Intranet use.

- (2) The communicator recommends possible web page improvements to clients. Communicators must always keep content-owner interest and reader usability as primary considerations when reviewing web pages. As a consultant, it is appropriate for W&I C&L to offer a solution for identified problems. The agreed upon solution should be in alignment with the client's interests and W&I C&L's professional responsibilities.
- (3) The communicator and webmaster analyzes and interprets web posting requests from clients and:
 - a. Provide feedback to the client as needed during the feedback process; W&I C&L should recommend appropriate improvements such as the insertion of related hyperlinks, editing of documents, and reformatting of pages
 - b. Request additional information from client as needed
- (4) The webmaster executes web posting requests from clients in accordance with the W&I C&L Communicator's direction, including:
 - a. Ensuring all links to IRS forms, publications, etc., go through the IRS Publishing repository
 - b. Using template pages
 - c. Creating appropriate bookmarks
- (5) The webmaster notifies the W&I C&L Communicator of completion of web posting. The webmaster also performs ongoing maintenance on web pages in the assigned program areas including:
 - a. Identify broken links and report them to client. Repair or delete broken links as requested
 - b. Identify orphaned files and pages and report them to communicator. Re-link or delete orphaned files as requested
 - c. Recommend deletions and archive documents as appropriate
- (6) The webmaster maintains the style and format (look and feel) of Insider web pages using the templates provided on the staging server. The webmaster notifies their manager and other appropriate individuals regarding web posting requests that may involve high-profile and sensitive issues. This ensures the request is appropriate and the material is cleared for posting. The webmaster consults and collaborates with others in W&I C&L, in the W&I Operating Division and in other organizations outside of W&I, to maximize accuracy and effectiveness of materials posted to the W&I web site.

- (7) Each W&I program area has an assigned primary backup webmaster, and a secondary backup. The current list of assignments can be found on the <https://irssource.web.irs.gov/WI/Lists/CL%20Generic/DispItemForm.aspx?ID=41>

11.55.2.13.2

(09-12-2008)

Role of Content Owners and Content Providers

- (1) Content owners and other content providers for the W&I Operating Division should produce and maintain effective Intranet and Internet web content that support the strategies of the W&I organization including technical accuracy, timeliness, maintenance and sensitive issues.

11.55.2.13.2.1

(09-12-2008)

Technical Accuracy

- (1) Content owners and Subject Matter Experts are responsible for ensuring the technical accuracy of all web page information.
- (2) Client needs, such as new business measures, programs or reorganizations, provide opportunities for a new page or to revise an existing Web page.

11.55.2.13.2.2

(09-12-2008)

Timeliness

- (1) SMEs content owners and W&I C&L consultants should have a clear indication of when web page content is needed. Content owners and SMEs must specify their due date expectations in their requests.

11.55.2.13.2.3

(09-12-2008)

Maintenance

- (1) In addition to the assigned W&I C&L webmaster, W&I C&L communicators, SMEs and content owners should all regularly check to make sure posted information is current, accurate and a reflection of the W&I organization. All should regularly check the following items:
- Usefulness of content and layout – If there are new business measures/strategies, reorganize the page so that the newest items are more prominent and easily accessible
 - Broken links – Correct with new information or remove the link if it is not needed. If the link is duplicated on another page, make sure it is also removed
 - Old data – If data is old but still useful as a reference tool, archive it by placing it on a new page linked to the original page
 - Obsolete and orphaned data - When the content owner identifies data that is obsolete, they should request that the webmaster remove it from the page and either delete it or place it in a folder on a shared drive

Note: If anyone identifies obsolete or orphaned data, they should consult with the SME and/or content owner before deleting or moving it.

Example: Reports for prior years can be labeled as “Past Reports” and shown on the page underneath the current reports.

- (2) Assigned W&I C&L communicators may suggest new topics, especially when a new business measure or strategy applies to the organization or most of the users.
- (3) Content owners and SMEs are responsible for the technical accuracy of information. However, the webmaster can make changes that do not change the technical meaning or accuracy.

11.55.2.13.2.4
(09-12-2008)

Sensitive Issues

- (1) If a content owner or SME wants to post information related to a high-profile topic or sensitive issue, W&I C&L communicators and webmasters should first notify their manager or other appropriate management officials before posting.

Exhibit 11.55.2-1 (11-06-2023)
W&I Communication Vehicles

If you need to...	Then use...	Best For... .	Limitations...
Promote upcoming events or news article for W&I employees	W&I Offline	Presenting news or sharing campus-specific information in a formal format.	Deadline for article submission is generally three weeks prior to publishing. Paper versions to W&I Campuses and e-versions to all others
Communicate news with a broad W&I audience	W&I Insider	Delivering messages to Headquarters (HQ), area office and campus employees.	Some campus employees do not have Intranet access unless registered through Campus Kiosks.
Communicate broad reaching information that is not time sensitive.	Inside the Insider	Pushing information directly to employees via e-mail.	Delivered first work day of each week. Special editions are infrequent.
Promote articles of interest to all employees.	Business Unit News (section of IRS Source)	Highlighting news not otherwise featured on IRS Source.	We only have one slot, so items are easily bumped based on priority.
To promote corporate and local events that affect campus population	Closed-captioned TVs/Weekly electronic newsletters	Promoting messages to employees who don't have regular computer access	Managers are encouraged to share with employees. Viewed on monitors and on websites
Deliver fast-breaking news or promote awareness of important programs, deadlines, special recognition, etc. (at the executive level) Example: Survey message, All W&I employee e-mail message	All W&I employee (and/or all W&I Manager) e-mail message	Pushing messages directly to HQ, area office and campus managers.	Some campus employees do not have e-mail unless registered through Campus Kiosks.
Promote information that must be relayed quickly Example: Shut-down directions	Telephone tree calls through functional management chain	Communicating in emergency situations may be dependent on immediate supervisors for relay of message.	Some campus employees do not have telephone access thus reliance is on managers to verbally pass along the message.

Exhibit 11.55.2-2 (09-12-2008)**Filing Season Readiness Certificate****Filing Season Readiness Certificate****FROM: DIRECTOR, WAGE AND INVESTMENT COMMUNICATIONS AND LIAISON****SUBJECT: FILING SEASON READINESS CERTIFICATION**

This is to certify that W&I Communications and Liaison has incorporated all elements of the basic filing season certification document into their overall planning process. Accountability for each item has been established. All items will be monitored for progress and timely delivery to ensure a successful filing season.

SIGNATURE: _____**PRINT NAME:** _____**DATE:** _____

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**W&I C&L manages the W&I communications
through the following reviews and reports.....1**

