



SOI Data Services Branch

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IRS Strategic Objective

Objective 4.8, Partner to expand insights: The IRS will engage with external partners to develop new insights to generate value for taxpayers and policymakers.

Objective 4.8 key project: Support government-wide program evaluation and evidence-building

- Develop a Data Service to safely support production of special tabulations and reports to aid the Department of Treasury and other agencies in evidence-building and program evaluation, as permitted under law.

The Data Services Branch will:

- Manage the Joint Statistical Research Program
- Undertake special studies on behalf of Treasury and other federal agencies as allowed under IRC 6108(b)
- Participate in specialized research opportunities



Strategic Objective 4.8 Key Project:

Strengthen and create research partnerships

- Issue annual calls for proposes for SOI’s Joint Statistical Research Program (JSRP), adhering to the OMB Standard Application Process.

Year for call of proposal	Number of proposals received	Number of proposals accepted	Number of institutions represented
2012/13	51	17	13
2014/15	80	12	17
2016/17	85	18	15
2018/19	113	29	29
2023	114	25	31
2024	63	In review	In review



Foundations for Evidence-Based Policymaking Act of 2018

Advances evidence-building functions in the Federal government by improving access to data and expanding evaluation capacity. Key recommendations aimed to strengthen privacy protections, improve secure access to data, and enhance government's evidence-building capacity.

26 U.S. Code § 6108 - Statistical publications and studies

SOI is authorized under the Internal Revenue Code (IRC) Section 6108(b) to release aggregated level statistics. The section authorizes the Secretary of Treasury to make special statistical studies and compilations involving return information (as defined in section IRC 6103(b)(2)).



Current and future projects:

- Department of Education, Free Application for Federal Student Aid (FAFSA)
 - Produce aggregated statistical tables that compare applicant and parent income reported on the FAFSA form and tax records
- Department of Education, College Scorecard
 - Produce aggregated earnings of federal student aid recipients for the College Scorecard website
- Department of Education, Gainful Employment
 - Produce aggregated earnings data of federal student aid recipients for the Gainful Employment and Financial Value Transparency regulations
- Department of Veterans Affairs, Veterans Benefits Administration
 - Produce aggregated earnings data of veteran's beneficiaries
- Bureau of Labor Statistics, Industry Productivity Studies
 - Produce ratio of partners to partnerships by NAICS codes



Special Research Projects

The branch will participate in a number of different initiatives that support the Evidence Act and will allow SOI to grow our services in an innovative and efficient manner.

- Privacy-preserving analytic methods
- Validation server prototype
- Secure data query service

