



2006 Meeting Minutes Area 5

- December 12, 2006
- November 14, 2006
- October 10, 2006
- September 12, 2006
- August 8, 2006
- July 11, 2006
- June 13, 2006
- May 22-23, 2006
- May 9, 2006
- April 11, 2006
- March 14, 2006
- February 14, 2006

**Area 5 Committee Meeting
TAP Annual Meeting
December 12, 2006
Hyatt Regency Hotel on Capitol Hill
400 New Jersey Avenue NW
Washington, DC**

DFO:

Marian Adams, LTA, Wichita, KS

MEMBERS:

Ralph Rivera, Garland, TX
Kenneth Wright, Ashland, MO
Kay Bell, Austin, TX
Lee Stieger, Leavenworth, KS
Rajiv Shah, Columbia, MO
Sandy Bland, Bemidji, MN
Rick Rousseau, Harker Heights, TX
Elizabeth Colvin, Austin, TX
Chris Freeman, Pleasant Hill, IA
Howard Guthmann, St Paul, MN
Bob Meyers, Omaha, NE
Warren Wong, Rochester, MN

MEMBERS ABSENT:

Mary Suther, Dallas, TX

STAFF:

Sandy McQuin, Manager, Milwaukee, WI
Mary Ann Delzer, Program Analyst, Milwaukee, WI
Patti Robb, Secretary, Milwaukee, WI



Welcome / Review Agenda / Introductions

Ralph welcomed everyone and reviewed the agenda.

This is Area 5

- **Ground Rules and Conference Call Etiquette**

Handout – conference call guidelines.

Call in number and information is at the top of the agenda and can also be found on TAPSpace. All meetings need to be announced for a minimum of fifteen days in the Federal Register. Everyone will be receiving telephone calling cards for TAP business.

- **2007 Calendar Preparation**

Conference calls are scheduled for the second Tuesday of every month, at 9:30 am, Central Time. Face-to-face meetings are rotated between states. The meetings are open and we try to attract public members to attend. Decision made to meet in Kansas City in May, 6-8, 2007. Delzer will try to arrange a visit to the Kansas City Campus to see return processing and phone operations. The goal is to break into subcommittee meetings during the face-to-face.

- **Area 5 Leadership—Sandy McQuin**

Each committee needs to choose a new chair and vice chair each year, Ralph took over as chair in the middle of last year and has indicated that he is willing to serve as chair again. Lee Stieger has also indicated he would like to continue as vice chair. Responsibilities include keeping the meetings on track, representing Area 5 when submitting issues to the Joint Committee and staying in communication with the staff. One difficult task is when the chair has to speak to a member because of poor attendance. There is a pre-call before each meeting to set the conference call agenda and a monthly report needs to be completed too. There is be two days of chair training sometime in January. The dates will be selected once all the chars are elected so they can decide. It has been recommended that the vice chair attend the training also but that will depend on the budget. Will chose a chair before the end of this meeting.

Chair Report

- **Approve Minutes of November 14, 2006**

November minutes were handed out for review and approval. Minutes were approved with no objections. Minutes will be approved via email and corrections are to be sent to Delzer within one week. Delzer will put "ACTION: due date" in the subject line of the email with the draft minutes. Last year quorum was determine to be 50% of active panel members plus one. That will continue through this year.

- **Joint Committee Report**

The minutes from the last Joint Committee face-to-face meeting will be out shortly. Most of the discussion was around the writing of the committees' self assessments and the TAP Annual Report. Once you have your training on TAPSpace, you will be able to see the past TAP Annual Reports.



Delzer explained the information regarding the survey for the Taxpayer Assistance Center. Remember, no overnight travel will be approved. You will need prior approval if you want to be reimbursed for travel. All are encouraged to participate! The Taxpayer Assistance Centers committee gets direction from their program owner. However the TAP still gets issues from taxpayers regarding other areas of the Taxpayer Assistance Centers. The area committees will need to work these other issues as the Taxpayer Assistance Centers committee is very focused on their specific assignments. We already submitted a recommendation that the Taxpayer Assistance Centers share space with other agencies as a cost saving option.

- **Area 5 Self Assessment**

Colvin and Guthmann volunteered to work on the Area 5 self-assessment. Delzer sent them the format, issue and outreach reports, and panel input received to date. The final report is due to the Joint Committee by the end of December. Delzer will forward the draft report to everyone on the Area 5 Committee for their input and comments.

ACTION: Colvin and Guthmann will prepare the draft Area 5 self-assessment by Wednesday, December 27, 2006.

Flowchart – handout. Delzer explained the basic process of the life of an issue. Delzer will do your research but it does not preclude panel members from doing research as well.

Working Grass Roots Issues

- **Gathering Issues**

Issues come to TAP from various places; the website, toll-free line, talking to taxpayers, etc. Should work on three issues at one time otherwise it strains your time and the time of your analyst.

1. Address for Payments – Stieger (lead), Bell, Freeman, Rivera
2. Taxpayer Assistance Centers –Wong (lead), Bland, Colvin, Guthmann, Shah
 - o payments
 - o wait time
 - o forms
3. Toll Free Issues – Guthmann (lead), Meyers, Rousseau, Wright
4. POA, Check Box Authority – Guthmann (lead), Wright

ACTION: Delzer will check with Mary Suther to determine her subcommittee preference.

- **Prioritizing Issues**

New issue #4018, regarding the amount of paper used by fax machine-consensus to drop.

- **Reports**
- **Use of Subcommittees**

Outreach Commitment-Meyers

Outreach is a continual discussion item. We are asking that each member commit to do a determined number of outreaches. The staff will send you brochures, pens, or other materials to hand out when doing an outreach. There is a PowerPoint show you can personalize and utilize. The two goals of outreach are to inform people about TAP, and to identify new issues from taxpayers.

ACTION: Delzer will put Outreach Commitment on the January agenda to discuss further.



Area 5 Chair / Vice-Chair Selection

Volunteers for Chair:

Ken Wright

Ralph Rivera

Vice-Chair: Lee Stieger

VOTE:

Chair is Ken Wright

Vice-Chair is Lee Stieger

ACTION Item Review

All action items have been completed.

Office Report-Sandy McQuin

There will be very limited staff in the office the week between Christmas and New Year's.

Closing / Assessment

Next meeting: Tuesday, January 9, 2007, 9:30 am Central Time



**Area 5 Conference Call
November 14, 2006**

Designated Federal Official

- Marian Adams, Local Taxpayer Advocate, Wichita, KS

Committee Members Present

- Sandra Bland, Bemidji, MN
- Elizabeth Colvin, Austin, TX
- Howard Guthmann, St. Paul, MN
- Steve Landauer, Davenport, IA
- Bob Meyers, Omaha, NE
- Ralph Rivera, Garland, TX
- Mary Suther, Dallas, TX
- Warren Wong, Rochester, MN

Committee Members Absent

- Richard Rousseau, Killeen, TX
- Lee Stieger, Leavenworth, KS

TAP Staff

- Bernie Coston, TAP Director
- Mary Ann Delzer, Program Analyst
- Sandy McQuin, TAP Manager

Welcome/Roll Call/Review Agenda

Quorum met.

National Office report-Bernie Coston

Attending all the Area calls this month to take the opportunity to personally thank the panel members closing out their terms. All members can take pride in how TAP continues to be more noted in the IRS community. Can see how TAP has evolved in the looking at the quality of the applicants in the recent recruitment. Want to thank Steve Landauer for his hard work and dedication to the program. He has made a major difference to the program. Steve has engaged his community and has been a pioneer getting other organizations on board. His affiliations made the Davenport Town Hall a success, with standing room attendance. The Davenport Town Hall has become a model for the future town halls. Steve will receive a token of appreciation for his hard work, as well as an exit survey. Landauer stated he enjoyed his time with TAP and had some fun too. Rivera thanked Landauer on behalf of all the Area members for his contributions to TAP

Guthmann asked if time would be available during the annual meeting to discuss the issue process. Coston stated that would not be a good venue, but recommendations could be made through the Area Committee. The Joint Committee does a good job at looking to at the merit of the recommendations before forwarding them on to the IRS. The Joint Committee looks at the impact of the



recommendation, such as the best interest of the organization, financial and legislative implications. The review committee makes sure that the issues are well developed.

Area 5 Chair Report

Approval of minutes – October 10, 2006

Minutes approved by consensus as submitted.

Joint Committee Report-out

Area 5 elevated two issues to the Joint Committee. The Power of Attorney /Third Party Designee issue was not accepted and returned to Area 5 to be reworked. The Joint Committee will consider the idea of further expansion of the check box authorization to three years. Area 3 elevated an issue to extend the authorization to one year from the date of filing, in regard to extensions given for natural disasters and this was accepted.

ACTION: Power of Attorney subcommittee to look at re-writing the Third Party Designee issue.

The issue regarding the training of Forms and Publications Employees was accepted by the Joint Committee. As requested by the Joint Committee, Delzer reworked the paragraph regarding the best practices of John Deere & Co.

ACTION: Delzer to email a copy of reworked issue, Forms and Publications-Employee Background, to Area 5 members for approval.

Coston added that TAP subcommittees are still working on the development of the TAP visions statement and the roll out of TAP measures. Still waiting to hear on the final approval of the new members

Area 5 Self-assessment

Rivera stated he appreciated the comments shared about his leadership and the need to be more prepared. Other comments concerned the number of issues and outreaches done. This is the members' responsibility and is the primary mode to get issues. All need to work harder to do more outreach. Anyone interesting in being the Area 5 chair should consider the position. The opportunity is open to anyone who has an interest in leading.

Guthmann asked about the election process for TAP Chair. Rivera reported that what will change this year is that the election will occur sooner during the meeting, before the Area and Issue Committee meetings. This will allow for the determination of Area and Issue Committee chairs in regard to who has been elected TAP Chair and Vice Chair.

McQuin stated the other big change is that members can declare their candidacy before the meeting which will give them time to campaign if they wish. There will also be an opportunity to declare at the beginning of the annual meeting. Area 5's suggestion regarding a nominating committee was discussed and Larry Combs sent an email to all members regarding how the process will work.

Meyers assured all that the Area 5 feedback was discussed. The Joint Committee members looked at the history of TAP elections and everyone has been eligible. Many felt the idea of a nominating committee closed off the opportunity for some. Did not want it to appear that TAP was a closed group. Colvin and Suther both agreed that a nominating committee should be pursued in the future.

McQuin reminded the members that for Area and Issue committees, another process could be used. Before traveling to D.C., need to start thinking about it this possible role.

McQuin suggested that a subcommittee be formed to complete the Area 5 Self-assessment as this is a big job for one person to do. The information needs to be pulled from the monthly report and minutes; Issues under Current Consideration, Accomplishments (Include information on all proposals



referred to Joint Committee), Issues Tabled, Disappointments, Outreach Activities.

ACTION: Delzer to send an email soliciting members to participate in a subcommittee to complete the Area 5 Self-assessment.

Issue Discussion

- **Toll Free Issues – Howard Guthmann**

Landauer stated that the referral seemed to combine two or three issues and so needs more work before going to the Joint Committee.

Guthmann acknowledged that Area 2 already forwarded a recommendation regarding the toll free and this will not conflict.

McQuin clarified that the Taxpayer Advocate Service (TAS) in Dallas receives inventory from the toll free site as they are collocated. They do not receive an inventory of complaints about the toll free. The issue statement makes it sound like the cases received are complaining about the toll free, rather than being received from the toll free site.

Adams also explained that the TAS toll free number is answered by the regular toll free assistors and Dallas TAS gets those referrals.

Rivera stated he did not agree on a separate number, but that calls should just be routed properly. It is simple for a carrier to route calls properly. Rather than a separate number, need to direct calls to the correct agent.

Meyers shared his concern that the issue statement and the proposed solution do not match. The issue statement is that the toll free system doesn't work, but the solution says we should have a number for practitioners. The Quality Review Subcommittee would return the recommendation saying the solution doesn't match the issue statement. Need to more fully define the problem.

ACTION: Panel members interested in participating on the toll free subcommittee should contact Delzer.

ACTION: Panel members should send input/feedback on the toll free issue referral to Guthmann.

- **Taxpayer Assistance Centers (TAC) – Warren Wong**

A call was held with eight members from the Areas of 2, 3, and 5. The issues that were discussed included, long waits, available service and lack of response. Just began by discussing how to organize the issues. Bill Matheny from Area 3 volunteered to be the subcommittee chair. The meeting will be the second Thursday of each month, beginning in January. Will further discuss the focus of the committee and look at the answers for specific issues. Chavez and Delzer will do further research for the subcommittee.

- **Website Errors—Ralph Rivera**

Issue that came in from the taxpayer was that there is no place to provide comment on errors on the IRS website. In spending some time on the site, there are several locations where feedback can be provided. Taxpayer may not have looked far enough. Recommend issue be closed.

- **Address for Payment—Lee Stieger**



No report.

- **Audits-accounts number—Mary Ann Delzer**

Delzer reported that no current TAP issues seem to be similar. Issue to remain in the parking lot.

Outreach

Wong suggested that in light of the current elections, people should contact their new Representatives.

Office Report—Sandy McQuin

Travel for Washington-please check your arrangements and call if you have questions.

Public Input

None

Closing / Assessment

Suther shared that she is concerned that not as many issues were worked this year. Rivera stated that if members did more outreach, Area 5 would have more issues to consider.

Coston reminded that the group needs to look at the quality of the issues. That is what is really important.

Next meeting December 12, 2006

Meeting Adjourned



**Area 5 Conference Call
October 10, 2006**

<p>Designated Federal Official</p> <ul style="list-style-type: none"> Sandy McQuin, TAP Manager <p>Committee Members Present</p> <ul style="list-style-type: none"> Sandra Bland, Bemidji, MN Howard Guthmann, St. Paul, MN Steve Landauer, Davenport, IA Bob Meyers, Omaha, NE Ralph Rivera, Garland, TX Lee Stieger, Leavenworth, KS Warren Wong, Rochester, MN 	<p>Committee Members Absent</p> <ul style="list-style-type: none"> Elizabeth Colvin, Austin, TX Richard Rousseau, Killeen, TX Mary Suther, Dallas, TX <p>TAP Staff</p> <ul style="list-style-type: none"> Mary Ann Delzer, Program Analyst Patti Robb, Secretary <p>Visitors</p> <ul style="list-style-type: none"> Laurel Cummings, Local Taxpayer Advocate, Dallas, TX
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Welcome/Roll Call/Review Agenda
Quorum met.

Meet the LTA - Laurel Cummings, LTA Dallas, TX

Laurel Cummings, Local Taxpayer Advocate (LTA), Dallas, TX, said they just completed the fiscal year. The Dallas Taxpayer Advocate Service (TAS) office is the largest field TAS office. They closed about 8,000 cases last year and close about 99% of the cases received each year. There are 45 case advocates in the office. We serve sixteen Congressional offices and get about 50 cases a month from them. The main issues seen in our office are; amended returns; audit reconsiderations; and mixed or stolen identities. There is a good mix of bilingual employees. We support the Dallas call site and about two-thirds of our work comes from them. We generate the remaining one-third through outreach and the Congressional offices.

She started her career as a tax auditor in Sacramento. She then went into the support area; personnel and facilities. Then she was the Quality Assurance Coordinator in Jacksonville. She was the coordinator for VITA/TCE in Florida. She was also the Staff Assistant for the District Director in Milwaukee. Then she went to TAS.

Cummings works closely with TAP members. If they contact her, she always tries to be available. She includes TAP members in her Congressional forums and participates in the TAP public meetings when they are in Dallas. On a yearly basis, all Congressional aides are invited to a meeting with local IRS operating division representatives. TAP members are invited to these meetings too. She offers panel members time on the agenda to talk about TAP. Cummings offered to share the agenda from last year. McQuin pointed out that the LTAs do this every year, however each one tends to be set up a little differently.

ACTION: Delzer to forward copy of congressional forum agenda to Guthmann.



Area 5 Chair Report
Approval of minutes – September 12, 2006
Minutes approved by consensus as submitted.

Issue Discussion

- **Toll Free Issues – Howard Guthmann**

Ready to write up. A suggestion that there be another toll free number to separate the difficult questions from the routine questions will be made. Something will be written up before the next meeting. Normally one person fields all the calls and makes the determination where the call should go. There needs to be a solution to how calls are handled.

- **Taxpayer Assistance Centers (Taxpayer Assistance Centers) – Warren Wong**

Have not done much in this committee. Delzer sent out research on September 18. There is already a TAC committee, but Director of TAC, Estelle Tunley, has given this committee a very specific project to work on so they do not want these issues. More than one TAP area has TAC issues to consider. Those areas need to speak with each other so there is no duplication of work. The Joint Committee is going to look at this problem and may decide to assign certain areas to work on specific parts of the issue.

Area 5 previously made a proposal that was elevated regarding IRS partnering with other agencies to cut costs, while increasing service. Delzer noted that was one of the issues included in the package that was sent out. TAP did not receive a response regarding that proposal. Most of the complaints currently received are about the extended wait times.

ACTION: Delzer to re-send research originally sent on September 18, to Bland, Guthmann, Suther and Wong.

- **Parking Lot**

#3842 – Audits – Accounts Phone Number – Meyers noted that one of the areas submitted a proposal on this issue; he is on the Quality Review Committee. Delzer will check on this.

3534 – Address for Payment

3835 – Website Errors

The above issues are in the parking lot. Consensus to activate these issues. Rivera and Meyers will look at Website issue #3835. Stieger will work on #3534 and will check with members not on call to see if they will help.

Outreach

Remember to send your outreach reports in. Work will start on the annual report soon.

Office Report

- **Elevated Issue: Availability of Reward Form 211**

This recommendation has been elevated. The IRS process changed somewhat so the recommendation had to be re-worded. The owner was identified and the recommendation was sent.

- **Face-to-Face meeting Planning for 2007**



Each committee has been asked to identify two potential dates for their face-to-face meeting so the managers can coordinate the master calendar. Also need to consider if this current timeframe works for your conference calls and should be continued.

The members present indicated they would like to keep the second Tuesday at 9:30 a.m. Central Time for conference calls.

It was suggested that the week of May 7, 2007, would be a good time to have the face-to-face meeting. Days later in the week seemed to be the preferred time.

ACTION: Delzer to poll members not in attendance to check their availability for the meeting days/times discussed.

Public Input

Steve Bankler – no comment.

Closing / Assessment

Stieger thought the meeting moved along well. Attendance was a little low. Guthmann thought Laurel Cummings was very impressive.

Next meeting November 14, 2006

Meeting Adjourned



Area 5 Committee Meeting Minutes September 12, 2006

Designated Federal Official:

- Sandy McQuin, TAP Manager

Committee Members Present

- Sandra Bland, Bemidji, MN
- Elizabeth Colvin, Austin, TX
- Howard Guthmann, St. Paul, MN
- Steve Landauer, Davenport, IA
- Bob Meyers, Omaha, NE
- Ralph Rivera, Garland, TX
- Richard Rousseau, Killeen, TX
- Warren Wong, Rochester, MN

Committee Members Absent

- Lee Stieger, Leavenworth, KS
- Mary Suther, Dallas, TX

TAP Staff

- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Welcome / Roll Call / Review Agenda Quorum met.

Approval of Minutes: August 8, 2006 Minutes approved as submitted.

Joint Committee Report

- **Election Process**
Area 5 forwarded their election process suggestions to the Joint Committee. They discussed the election process, however consensus was not achieved and so they are going to revisit this issue again during the face-to-face meeting in Dallas in October. All the information forwarded will still be considered then. Most members were disappointed that they could not come to consensus. The input from all the committees was so varied it actually was difficult to make a decision.
- **Power of Attorney (POA) Elevated Issue**
This issue was not presented at the Joint Committee meeting because Area 5 was not represented on the call. This issue will be on the agenda for the October meeting. Being on the



agenda at the face-to-face meeting could be a good thing because it can be discussed at length if needed. There were good ideas exchanged on outreach.

Issue Discussion

- **Training for Forms/Pubs Employees – Landauer**

This report was sent out to the committee members for comment. Guthmann questioned if the report was strong enough – will they do anything about this? Steve felt it is kind of a gentle report. Bob Meyers said to look at the website for forms and pubs. People who write them do not have to be in DC to be valid. Landauer said Sandy Kopta, Chief, Individual Forms and Publications Branch said she would welcome this report. Consensus to elevate to the Joint Committee. Meyers will explain this issue to the Joint Committee when they review it at their next meeting. Bob is on quality review sub committee for Joint Committee and thinks it will go through easily.

- **Toll Free Issues - Guthmann**

Guthmann had a conference call with Intuit and they agreed to give him more technical information on their toll free operations. They called him back last week but he was on vacation and has since set up a conference call with them for this afternoon. He will write a report after the call.

- **New Issues**

The list of new issues was sent out with the pre-read. Many area committees are looking at working on issues that will be ready to be presented and discussed at the annual meeting to help the new members learn the process. The Taxpayer Assistance Centers (TAC) issues shown as new on this list were actually sent back from the TAC Committee. The TAC issues listed are not in their scope this year. Guthmann asked if we decide to work these, can they be sent directly to the Joint Committee after they are finalized or do they have to go through the TAC Committee? The response is that they would go directly to Joint Committee. Delzer will check to see if any other committees are working these issues. Guthmann thinks this is a hot issue and Area 5 should look at them.

Subcommittee makeup: Wong (chair), Guthmann, and Bland - Delzer will set up conference call to look at issues #3789, #3843, #3992, and #3996.

ACTION: Delzer will send out an email to Suther and Stieger to see if they are interested in being on this Taxpayer Assistance Centers subcommittee.

After discussion, decision was made to drop issues #3899 and #3962.

McQuin congratulated TAP on the publicity around the letter/issues forwarded to the Commissioner. Toy has been posting all the articles on TAPSpeak. A reporter was on the Joint Committee call when TAP was finalizing the letter/issues and that is how it all started. It has been a very positive thing.

Outreach

Wong – met with one of the candidates for Senator for the State of Minnesota. He will write it up and send to Delzer.

Office Report – Sandy McQuin

- **National Taxpayer Advocate Objectives Report 2007**
Members have been sent the TAP portion and table of contents of the report. McQuin pointed out that Nina Olson, National Taxpayer Advocate, does two reports a year. The panel is mentioned in this report. It's interesting to go through the table of contents to see what Olson is looking at as the current top issues of concern. Her next report will come out in January 2007. This report discusses the structure of TAS and the areas of emphasis for next fiscal year.
- **Elevated Issue: Availability of Reward, Form 211**
Quite a while ago Clif McKenzie, prior Area 5 Chair, submitted this issue to the Joint Committee. Unfortunately, the process was being changed at that time. Now the report elevated doesn't fit into the new process, so the Joint Committee returned it to Area 5. It is a valid issue but the report needs to be reviewed in light of the process changes. The main issue is McKenzie wanted Form 211, Application for Reward for Original Information, to be readily available and easily found on irs.gov. In the past you could call a toll free number that took you directly to the fraud referral unit. Now you have to order the form and if you don't know the form number, you will not get the Form 211. Unless you ask specifically for an award, it will not be offered.

ACTION: Delzer to send referral to Rivera. He will discuss with McQuin and Delzer, rewrite, and have revision available for October meeting.

Public Input

None.

Closing / Assessment

Landauer expressed concern that Area 5 did not have a committee member on the Joint Committee call. We should have had a representative.

McQuin noted that it was a last minute thing so we didn't have time to get anyone to represent Area 5.

Guthmann said there needs to be some type of procedure for representation for issues that get sent to the Joint Committee. He worked hard on and finished the POA issue several months ago and was very disappointed that it was not addressed on the Joint Committee call.

McQuin suggested that if you elevate an issue, you as the author should sit in on the Joint Committee call as a member of the public. That way, if there are questions on the issue, you can discuss them. You will not represent the committee as the chair will be on as the representative.

ACTION: McQuin will check to see if a telephone available for a conference call when this POA issue is discussed at the Joint Committee face-to-face meeting.

Next Meeting: October 10, 2006, 9:30 a.m. C.T.



Area 5 Committee Meeting Minutes August 8, 2006

Designated Federal Official:

- Marian Adams, Local Taxpayer Advocate, Wichita, KS

Committee Members Present

- Sandra Bland, Bemidji, MN
- Elizabeth Colvin, Austin, TX
- Howard Guthmann, St. Paul, MN
- Steve Landauer, Davenport, IA
- Richard Rousseau, Killeen, TX
- Lee Stieger, Leavenworth, KS
- Mary Suther, Dallas, TX
- Warren Wong, Rochester, MN

Committee Members Absent

- Bob Meyers, Omaha, NE
- Ralph Rivera, Garland, TX

TAP Staff

- Sandy McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors:

- Mary Hickey, Local Taxpayer Advocate, Omaha, NE

Welcome / Roll Call / Review Agenda

Quorum met.

Meet the LTA – Mary Hickey, Omaha

Mary Hickey is the Local Taxpayer Advocate (LTA) in Omaha, Nebraska. She has been with the Internal Revenue Service (IRS) for 25 years; the last five as the LTA in Omaha. Before that, she worked in TAS, Problem Resolution, and walk-in (currently the Taxpayer Assistance Center). She has one senior analyst, four case advocates, and one secretary in her office. She has enjoyed working with Bob Meyers. He came to the office on April 6 to meet IRS employees. He invited me to attend the Communications Committee face-to-face meeting in Omaha. She looks for joint outreach opportunities for TAS and TAP.

The trend we are seeing this year is an increase in cases. We have received 736 cases to date compared to 465 cases last year. That is a 46% increase. We believe it is related to a better awareness of TAS and more IRS emphasis on enforcement activities. We were Involved in the TAS immediate intervention in the Fresno cases. There was a date stamping problem and that caused a lot of problems. Please look me up if you are ever in Omaha.



Area 5 Chair Report - Stieger Approval of July 11, 2006, Minutes

Minutes approved as submitted.

Joint Committee Meeting

- **Free File Report**
McQuin reported that Joint Committee Report had a very short call this month. They didn't address any elevated issues, but only worked on finalizing the reports for the Commissioner. The Free File report, along with the rest of the reports, are being reviewed by the Joint Committee's Quality Subcommittee before the reports are forwarded to the Commissioner.
- **Election Process**
TAP is considering changing the way chairs are elected. Delzer forwarded an email from Combs with options and points of discussion. Guthmann thinks Area 5 should suggest a nominating committee. He will write up a proposal for the committee's consideration. The nominating committee could be comprised of the retiring TAP Chair, the chair of each area committee (or a designated member), along with a couple staff members. The first year members would probably not be serving.

The Joint Committee was concerned that there isn't enough time to have area and issue committee meetings at the annual meeting as the election takes up so much time. Also, it is hard to get to know people in such a short time. They thought this would be a good way to start this year.

Wong asked if there is a definition of the chair's responsibility. McQuin shared that one thing Coston is working on is establishing four subcommittees on various internal TAP issues. An email will come out soon asking for volunteers.

1. Establishment of a vision statement for TAP
2. Establishment of a stronger TAP member description - We have an ethics agreement and a TAP member guide, but need to improve the position description.
3. Member evaluation process/how to evaluate members.
4. Creating Measures

As you can see, Coston is looking at establishing a position description for panel members. You may want to ask for a more extensive list of duties, responsibilities, and the time commitment. Stieger thought the descriptions in the TAP Handbook were pretty accurate; however we definitely need to emphasize the time commitment.

A change in the election process would have to be fast tracked to be able to get it done this year. It may not go quite as smoothly as we would like this year, and would be better next year. Colvin agrees with Guthmann's suggestion. Suther thought we should say people serving on the nominating committee cannot run for Chair. Bland added it should be limited to people who have not held a chair position in past. Colvin agreed. Suther agreed that the position description for chairs in the TAP handbook is good with exception of time commitment issue.

ACTION: Guthmann will email his suggestion of a nomination committee to Area 5 Committee members for their comment by August 14.

ACTION: Delzer will consolidate all comments and ideas for the chair election and forward to Barbara Toy by August 31.



Stieger said everyone should look at Guthmann's report and give feedback or comments to him. Colvin thought chairs interested in running again could appoint someone to the nominating committee in their place. The nominating committee should be people serving the final year of their term – be it a two or three year term.

Issue Discussion

- **Training for Forms/Pubs Employees - Steve Landauer**
Our subcommittee had a conference call with Sandy Kopta, Chief Individual Forms and Publications, and we asked what we could do to help them. She stated that we could write up a recommendation that the IRS should hire more writers/editors. We are working on the process to determine whether Counsel has overwriting authority. The real issue is the ability to write a proper sentence and paragraph. We will be putting something together for the next meeting. Stieger suggested they may want to add something about hiring contractors to do that type of work.
- **POA Issues – Rick Rousseau**
Guthmann worked on this issue and a recommendation was sent to the Joint Committee. Joint Committee will consider the recommendation at their September meeting.
- **Toll Free Issues**
Guthmann and Landauer are still researching the issue.

Outreach

Suther reported the Congressional Forum in Dallas was a great success. It was not at all what she thought it would be. The IRS spoke about various issues; bankruptcy, exempt organizations and several others. The IRS stakeholder liaison does outreach with stakeholders and other folks. Guthmann said he has been invited to go to some outreaches by Stakeholder Liaison employee Carol Smith. Bland got a call from Stakeholder Liaison employee Patricia Buttweiler. Delzer attended the Practitioner Liaison meeting in Wisconsin last week. She said you can find out what the hot topics are in the IRS. Suther said one of the major issues she heard addressed is the way people are brought up for audit and the way money is collected. McQuin noted that you may hear from other parts of the IRS of issues that may turn out to be a great issue for TAP to look at. It may also give you a different look at issues. Suther called her LTA to find out if anything was happening, and she suggested all TAP members call too. McQuin said we are getting toward the end of the fiscal year so you may not be able to participate in outreaches this fall, but it cannot hurt to get on their radar.

Landauer spoke to United States Senate Majority Leader Bill Frist about TAP.

Office Report – Sandy McQuin

Recruitment is coming along. We are finished interviewing for all the areas and are now waiting for background checks, tax checks, and fingerprints. This year we have an additional check; a subversive name check. That may delay things a little bit. We have done everything we can do; now we have to wait for the checks. Coston is tracking everything and hopefully it will go smoothly. We have a contact in Treasury to help us. It will all be sent forward and out of our hands soon.

The annual meeting is set up for the week of December 11, 2006. Suther said she will be unable to attend the annual meeting due to another commitment.

Public Input

None.



Closing / Assessment

Everyone felt it was a good meeting. It moved along with direction and everybody participated. There were good ideas exchanged on outreach.



Area 5 Committee Meeting Minutes July 11, 2006

Designated Federal Official:

- Marian Adams, Local Taxpayer Advocate

Committee Members Present

- Sandra Bland, Bemidji, MN
- Elizabeth Colvin, Austin, TX
- Howard Guthmann, St. Paul, MN
- Bob Meyers, Omaha, NE
- Ralph Rivera, Garland, TX
- Richard Rousseau, Killeen, TX
- Lee Stieger, Leavenworth, KS
- Mary Suther, Dallas, TX
- Warren Wong, Rochester, MN

Committee Members Absent

- Steve Landauer, Davenport, IA

TAP Staff

- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors:

- Dominic McClure, H&R Block

Welcome / Roll Call / Review Agenda

Quorum met.

Area 5 Chair Report

- **Approval of June 13, 2006, Minutes**
Minutes approved as submitted.
- **Joint Committee Meeting - Stieger**
One of the big topics was the issue of TAP's continuity from year to year. One idea they came up with was to move the elections before the annual meeting, to save time during the meeting. This should result in a better transition to the next year. There were three suggestions:
 1. Possible election of TAP chair and vice chair prior to the annual meeting
 2. Area chairs selected from returning members, but the vice chair could be a new member



3. Issue chairs also elected prior to the annual meeting (problem is membership may change as people may change issue committees)

Meyers said that TAP Chair Combs sent out an email requesting input on the issue. This is a change of philosophy as before everyone, even new members, could apply for chair positions. One of the options I plan to suggest is that maybe we elect a president elect, someone who is in their next to last year. Then at annual meeting you elect a new vice chair.

Delzer noted that that the chair elect idea has been tried and you may you find the chair is not a good leader after all. It has not worked out well in the past. You are also excluding all the people who have then been on the panel for one year as they are not allowed to vote for a new chair.

Guthmann said he feels the election process could be handled better at the annual meeting, but the issue flow is more important than who the chair is.

Stieger added if the chairs are elected before hand, the old and new chair could work together to ensure a smooth transition.

Wong said part of the problem is procedure and part of the problem is the person elected. We need a better definition of chair responsibilities.

Guthmann teaches a course on volunteerism and said part of the problem is that some of the people are scared to run. He suggested that there should be a formal nominating committee. They could talk to the people who are interested in volunteering for a chair position.

Stieger felt one of the problems is that it takes too long to get to know people. Maybe an individual's information could be put on TAPSpeak.

Delzer noted that the new people don't have access to TAPSpeak so they won't get to vote.

Guthmann said there has to be a certain amount of trust for the people on the nominating committee. There could be a separate mailing to all members so everyone gets it and can vote.

The comments and responses on this issue are due August 28. Area 5 will have another meeting before then so everyone should forward their comments so it can be discussed at the next meeting.

ACTION: Panel members to consider email from Combs about how to improve the election process.

Area committees should consider developing a permanent screening subcommittee for new issues.

We are getting a new contractor for TAPSpeak so the Communication Committee is asking for your comments about TAPSpeak be sent to Maryann Motza.

They also talked about attendance at meetings as some areas are experiencing a problem. Please, if you are unable to attend a meeting, notify the chair or the staff as to why.

ACTION: Stieger will email a summary of Joint Committee meeting.



- **Free File Report**

The report as submitted did not address what the Joint Committee had hoped would be addressed. They wanted us to address IRS Free File specifically. Report can also address taxpayers' perceptions as well. A new draft was sent out which pretty well covers both issues and expresses our point of view. Stieger noted the Joint Committee wanted it shorter than the original report. Three of the write-ups for the Commissioner's issues were accepted at the Joint Committee meeting. They were aware of the pending legislation from the finance committee. It was not included in this report since it still hasn't passed. We should be concerned about what the IRS can do about this now.

Rivera said it's important to note that there is pressure coming from many different angles. We need specific comments on the latest draft. That should be our focus.

Guthmann commented that the software vendors make a mistake by charging extra to file. Delzer will add something about bundling – software companies bundle all the fees – and then send forward. Bland likes the write-up. Consensus to forward report to Toy.

Issue Discussion

- Training for Forms/Pubs Employees - Landauer
ACTION: Delzer will set up subcommittee meeting with the Chief of Individual Forms and Publications.
- Power Of Attorney (POA) Issues – Rousseau
Consensus to elevate recommendation to the Joint Committee.
- Toll Free Issues – Guthmann
We are waiting for some information from Landauer; will have something at the committee next meeting.

Outreach

Wong did an outreach – talked to 35 people who were members of SCORE – a chamber of commerce type committee. He also talked to a men's group from church – about 15 members.

Meyers did an outreach while he was on vacation. A couple people he talked to expressed interest in becoming TAP members.

Guthmann did an outreach with American Institute of CPAs.

Rivera said outreach is a forum to gather issues as well as to get information out about TAP. The reporting is as important as doing the outreach.

Office Report

The Joint Committee will be sending out new success stories to all the members. As soon as that is completed, it will be forwarded to all TAP members. Gil Yanuck is working on this now.

All interviews have been done for Areas 4 and 5. Area 4 is meeting this week so McQuin, Robb and Delzer will be out of the office at the end of the week. All the managers and analysts will be in New Orleans the week of July 17. The secretaries should be in the office if you need anything.

Public Input

None.



Closing / Assessment

Bland – went well

Colvin – moved along fine

Guthmann – went fine

Meyers – Stieger did good job of explaining issues. Apologize for being gone.

Rivera – good meeting. Got full membership today except for one person.

Rousseau – apologized for joining the call late and seemed fine. Have been very busy lately but hope to catch up now.

Stieger– thanked Ralph for chance to go to Joint Committee meeting. Learned a lot and met some great people.

Suther – great meeting and thanked leadership of subcommittees. Great write-ups.

Wong – good meeting and got lots of good input.

Meeting Adjourned



Area 5 Committee Meeting Minutes June 13, 2006

Designated Federal Official:

- Marian Adams, Local Taxpayer Advocate

Committee Members Present

- Sandra Bland, Bemidji, MN
- Howard Guthmann, St. Paul, MN
- Steve Landauer, Davenport, IA
- Ralph Rivera, Garland, TX
- Richard Rousseau, Killeen, TX
- Lee Stieger, Leavenworth, KS
- Warren Wong, Rochester, MN

Committee Members Absent

- Elizabeth Colvin, Austin, TX
- Bob Meyers, Omaha, NE
- Mary Suther, Dallas, TX

TAP Staff

- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors:

- Dominic McClure, H&R Block

Welcome / Roll Call / Review Agenda

Stieger welcomed everyone to meeting. Quorum met.

Minutes approved by consensus for the May 9 / May 22-23 meetings.

Joint Committee Call--Rivera

The memos to be prepared for the Commissioner were discussed at the Joint Committee meeting, including the Free File issue assigned to Area 5. Rivera commended the sub committee for their work. Joint Committee would like something to review at Denver meeting on June 29-July 1. We will try to meet dates if possible.

Issue discussion

- Training for Forms/Pubs Employees - Landauer
McQuin is setting up a conference call with Sue Sottile to discuss the issue.



- POA Issues – Rousseau
Guthmann has written up a possible recommendation and Delzer sent it out to the subcommittee. Will need to set up a subcommittee call to discuss the previous responses received from the IRS.

Guthmann noted that Delzer found that Area 3 is working on a similar issue. They are talking about the check box authorization being legislative. Have read the check box burden reduction project information and Commissioner Rossotti said it should enable the resolution of questions regarding the processing of taxpayers returns. Need to research further to see if this is legislative. Rossotti provided statistics in his report about burden reduction. Feels it is not in the law and could be done without legislation. Landauer agreed that this is definitely a real issue. Rousseau stated that we should look at the legislative history; it may provide more backing. The check box is only good for one year and the IRS admits they seldom get to examining return within one year.

ACTION: Rousseau to set up conference call for the POA subcommittee.

ACTION: Guthmann will write a draft recommendation on POA for discussion at the subcommittee meeting.

- Toll Free Issues – Guthmann
Delzer arranged a meeting with four people in Atlanta who staff the call sites. They claim the average wait time is 4 1/2 minutes and my office has never gotten a response that quickly. We need to discuss with IRS to see what possibilities can improve the response rate. They have to be open to change. So many people don't have difficulties and they have their issues taken care of quickly, but the problem cases are the ones not being taken care of timely. Landauer and Guthmann will have another call with SERT. They used to operate under a temporary employee model and are now going under a permanent employee model. Adams stated TAS gets the problems and it's difficult to identify how many people are really impacted. It is something the IRS has been working on year after year.
- Free File – Bland
Bland has written a draft Free File report for the Commissioner. Area 5 needs to decide whether it is ready to go to the Joint Committee.

Landauer stated he was at a tax forum and they discussed paper vs. e-file. There was less than a \$2 cost difference between them. The real issue here is the accuracy as the error rate on an e-filed return is 3% and for a paper return is 24 %. That is a significant difference.

Guthmann also said the problem is accuracy, error and the rejection rate. It is awful to have an e-file return rejected because name and the ID number don't match.

Bland said when the advisor of the National Taxpayer Advocate said they were trying to get the hard numbers on the cost of paper filing vs the cost of e-file to calculate the real savings.

Guthmann said isn't the issue whether free filing is going to be free for everyone or not?

Landauer's concern is why should anything be free? It's life to have to pay for things.

Guthmann stated why should we have to pay for something the IRS requires us to do?

Bland reminded everyone we don't pay the IRS, we pay the software companies.



Stieger stated that people feel that the IRS is charging people to do it. If the software is going to charge extra to e-file, why shouldn't I mail it in? They need to provide an incentive for me to e-file. Guthmann said the software companies set this up by charging extra to e-file the return. If they didn't have to pay extra to e-file, the numbers would increase. If the software would e-file it for you and could guarantee it would be accepted, there would be a tremendous increase.

Bland explained that the returns could be batched by the software companies for the IRS. In short term could go with template plan rather than the IRS developing the software. Wong said that if it was thrown open for competition it would be better.

Rousseau agreed stating the advantage to having fees keeps the commercial software competitive. Having all filing free will dry up competitiveness. Competitiveness keeps the improvements coming. They keep trying to make it better.

Delzer suggested that Area 5 send the draft report to the Joint Committee for consideration. They can return the report to Area 5 for further clarification.

Consensus to send to Joint Committee by June 23 before Joint Committee meeting at end of month.

ACTION: Bland to send final draft to Delzer to forward to the Joint Committee before June 23, 2006.

Outreach

Please review the report that was sent out.

Office Report

We will be interviewing the new applicants next week so if anyone wants to participate, please call the office.

Public Input

None

Closing / Assessment

Good discussion and moved along. Spent a good deal of time on e-file, but it is a very hot issue. Good job with report. Meeting adjourned.



**Area 5 Committee Meeting Minutes
May 22-23, 2006
Face-to-Face Meeting
55 West 5th Street, St Paul, MN**

Designated Federal Official:

- Marian Adams, Local Taxpayer Advocate

Committee Members Present

- Sandra Bland, Bemidji, MN
- Elizabeth Colvin, Austin, TX
- Howard Guthmann, St. Paul, MN
- Steve Landauer, Davenport, IA
- Ralph Rivera, Garland, TX
- Lee Stieger, Leavenworth, KS
- Mary Suther, Dallas, TX
- Warren Wong, Rochester, MN

Committee Members Absent

- Bob Meyers, Omaha, NE
- Richard Rousseau, Killeen, TX

TAP Staff

- Sandy McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors:

- Bernie Coston, TAP Director

Monday, May 22, 2006

Welcome/ Announcements/ Introductions

Ralph Rivera welcomed everyone. He thanked Howard Guthmann for making his conference room available for this meeting. As you are aware, Clifford McKenzie stepped down as chair due to health problems, and as vice-chair, I assumed the chair responsibility. We will need to elect a vice-chair today.

Directors Comments--Coston

Where are we going in TAP? In the course of time we have evolved. Just three years ago we were struggling with notoriety in the IRS organization. We would go to IRS and they would basically ignore us. It has changed dramatically in the past year. The improved interest is based on the quality of the



recommendations going forward and the IRS now sees TAP as very credible. The annual reports have improved in quality too. We have only just begun and there is always an opportunity for improvement.

It is important that you know your roles and responsibilities as members. You had one of the most successful town hall meetings so far this year. Landauer did a fantastic job. He has shown a great amount of passion in what he has done with TAP. His passion for IRS partnering with the YMCA has taken off. It has a long way to go but it is in motions. This initiative was Landauer's passion. He managed to get to the right people. He was tenacious. You as TAP members often see things the IRS does not see. National Taxpayer Advocate (NTA) was very happy about the town hall meetings and they are going to continue. Because of some of the things Landauer did, it was determined that town hall meetings must be held in a city where a TAP member lives. Your role as a member is very important and the way to learn about TAP is to get engaged in the issues. You bring so much experience and knowledge to the table. It is imperative that you need to take on the role of leadership when necessary. We don't want you to sit on the sidelines. You need to jump right in and rise to the occasion.

Landauer questioned the amount of the annual budget for TAP. Coston shared the TAP budget has been pretty flat, at about 1.2 million dollars. That is travel and administrative support. The actual travel amount is \$525,000 and that covers everyone's travel, TAP members and staff. I think we do a good job with what we have. The lions share is taken up by the annual meeting. Then each Area and Issue committee has a face-to-face meeting. Each meeting runs at a minimum of about \$12,000 per meeting. We would like to be able to have more face-to-face meetings for each committee, but the budget does not permit that right now. I have encouraged the committees to add a half day to each meeting to give you more time together. Will also continue to be in dialog about increasing the budget for TAP.

Landauer suggested eliminating the issue committees and each area committee should meet twice. Coston stated some of the issue committees are really gaining momentum and have a tremendous amount of support from the IRS. They really want TAP's input. The issue committees are extremely viable. Most of them feel they could use another face-to-face meeting each year. I will try to see if we can get more money allotted in the future. Commissioner Rossotti's focus was customer service. Commissioner Everson's focus is compliance.

Landauer stated his concern was accountability. If TAP can spend 3 million a year, we need to show something for it. Coston reminded the group that TAP has been a fledgling organization. This year during recruitment, we got over 900 applications for 28 slots. We are more recognized now. I know the budget is the number one issue on everyone's mind. McQuin stated last year was unique because Area 5 had so many new members. This year at the annual meeting the face -to-face you have will be more like a regular face-to-face. You should be able to accomplish much more because you have so many returning members.

Coston wants the staff to work on this so everything transitions smoothly. There has been a gap between TAP member effectiveness between September and December. That should not happen this year. I want you to continue to have meetings during these months – right up to the annual meeting. You should not have to start from scratch. You will have a strong foundation already. Already have dialog with the organization.

Stieger commented that he did not get the handbook until 30-45 days after the meeting. It is a pretty good handbook and would have been better to get it before the annual meeting so it could be reviewed before the meeting. Once someone is notified they are a member, the information should be sent out at that time. The handbook was pretty easily understandable as far as committee responsibilities. McQuin answered that it was written by panel members and having it sent early is an excellent idea.



Guthmann thinks NTA and Commissioner should spend more (unlimited) time with the panel members at the annual meeting. They should be available for a whole day. Coston stated that is ironic because the feedback from the whole panel was they wanted more time for committee meetings and not so much time at the plenary. Coston will mention to Nina that they would like her to spend a half day with us. Guthmann reminded all that TAP members are volunteers and they should be able to adjust their schedules to spend time with us. McQuin reminded that the IRS has several advisory committees. TAP is the only one who actually works with the taxpayers.

Landauer asked for an update on the elevated CPE issues. McQuin said Chris Lee has this issue and is currently working on a response.

ACTION: McQuin will follow up on the status of the response to the elevated CPE issue.

Election of Vice-Chair

Stieger volunteered to serve as the new Area 5 Vice-Chair. Coston applauded Rivera for stepping right up into the Chair position once McKenzie resigned. Rivera welcomed Lee as the new vice-chair.

Issue Discussion

- **Training for Forms/Pubs Employees**

Landauer explained that the issue is whoever is writing these things are not properly trained to write. This area is comprised of attorneys, accountants, and support staff and no one is trained to write properly. Denise Fayne said they have four trained writers, but they keep quitting or moving on. This is a skill set and people should be trained properly to write technical notices. There is an AP Stylebook, but the IRS does not use it. The big thing is these are written for taxpayers, not lawyers.

Suther stated that the Notice area is grappling with the same issue. The principles will be the same for notices and for publications. Stieger said they are updating notices and they are trying to do it from a blank page up. They are using the TAP Notice Committee as a sounding board. They come up with a draft and are looking to us to review it. We are asking the same questions on the policy as to who is writing them. Landauer has a conference call today with a person at John Deere to see how they handle this issue. Stieger agreed that TAP needs to push this that IRS improves communications with the public so it is readable. Landauer, Stieger, and Bland will be on the call with the representative of John Deere.

- **POA – Howard Guthmann**

In 2004 TAP wrote to IRS and still has not received a response. McQuin said we got a response last week and she brought a copy of the response. Guthmann feels very strongly about this issue and wants to elevate a new recommendation. We really need to do something about the checkbox on the returns. Guthmann feels the check box should be good as long as the return is open and the designation stays the same until the taxpayer actually makes a change. The IRS also limits the issues you can speak about on this return. And the IRS is not consistent in following the guidelines as far as the checkbox is concerned.

- **Voice Mail on Toll Free – Howard Guthmann**

Guthmann spoke to the Director of the Joint Operations Center (JOC) at the Atlanta Processing Center about their telephone system. Most issues received by the LTAs are a result of the lack of service from the IRS. When you call the IRS, your call can get routed to anywhere in the United States. And if you need to call back, you never get to speak to the same assistor.

McQuin explained the calls get routed to the next available assistor. The JOC Director explained that IRS would not even consider putting on voice mail, but they are considering several things to reduce the waiting time. There are eleven toll-free issues being worked on by other committees. Delzer stated



these kind of changes involve budget issues. IRS is looking at 1) caller authentication, and 2) caller wait-time notification. Guthmann stated maybe the issue itself needs to be revised. The issue is how IRS responds to telephone calls.

- **E-file Emphasis/Taxpayer Rights – Ralph Rivera**

We made several recommendations and I don't know where we stand at this time. Other than the previous work, I don't know where we will go with this. Stieger, this issue should either be rolled into free file or put in the parking lot until we get done with the free file issue. Consensus to put in parking lot until response to Commissioner is completed.

- **Issue Review – Mary Ann Delzer**

With a group this size, you need to pick a couple issues to work and put the rest in the parking lot. Guthmann and Stieger went through all the Area 5 issues and prioritized them. They closed the legislative issues and the issues that were already being worked by other committees.

Free-File Report for the Commissioner

Coston shared that the panel members who met with the Commissioner were Brubaker, Woo, Duquette, Kasturi, Havey, Combs.

The Commissioner wants input regarding:

1. Section 7216 regulations (selling taxpayer information)
2. Return preparers regulations (licensing)
3. The direction of VITA/TCE (as TAC offices decline, what role are VITA/TCE going to serve)
4. Private collection agencies (parceling out of "old" debts to collect on behalf of the IRS)
5. The availability of "Free-file" for taxpayers (this year, the ceiling was cut back)

Coston last filing season there was no income cap on the Free File program. Some of the vendors felt the IRS was taking away business from them by offering electronic filing for free. Congress listened to their claims. The NTA came back and said if it is "free file"; it should be free to everyone. Why can't the IRS put a template on the irs.gov that will allow everyone to free file directly to the IRS without going through a third party? Commissioner wants to know what taxpayers are saying. What will make the taxpayers e-file? What's it going to take to get there and how are we going to get there?

Free File Brainstorming

- Difficult to find – have to know where to go
- "Up-selling" return check– audit protection
- Must enter through "the portal" for free
- RALs sold on Free File
- Error code problems – what do they mean to "real" people
- If template – should not have dollar limit
- Use of commercial software – but transmit free
- Eliminate the vendor – direct filing to IRS
- Do we need incentives – get refund quicker
- What do we really want to call this program...name deceptive?
- Take bids and purchase the software / or royalties

Position: Availability of Free File

- Website based



- Negotiation position “weak” Dollar limits compromise
- Industry – how it affects their business
- Congressional interest
- Nina – template on irs.gov – direct filing

Landauer stated when you e-file, you have to wait 24 – 48 hours to find out if it’s been accepted. Once you send a paper return, it’s gone. Why should the software companies do this for free? They are a business and are in it for the profit.

Subcommittee members: Stieger, Bland, Wong

ACTION: Initial draft to Area 5 by Friday, June 9. It will be sent to all committee members for review and then discussion by the meeting on June 13, 2006.

Sub Committee work for the remainder of the day

Closing/Assessment:

Good meeting

Everyone participated

Able to go through the issue list and thin out

Great meeting. Went overtime on some issues but caught up at the end

Stayed on focus

With new chair and three “new” members and the committee really gelled. The interaction was great and everyone participated

Thanked Howard for use of meeting space. Good to meet everyone

Good meeting and pleasure to meet everyone. Having gone to two face-to-face meetings, back to back, I have gotten more excited about TAP. Not just a voice on the telephone anymore.

Meeting Adjourned

Tuesday, May 23, 2006

Welcome/Announcements/Review Agenda

Meet the LTA: Joe Warren

Joe Warren is the new LTA in Minneapolis. Warren explained he has an office of six advocates. TAS wants TAP to succeed because TAP will help make our job easier. Due to the increase in enforcement actions, the percentage of lien and levy cases has increased dramatically. Most calls we receive this time of year is someone looking for their refund, or they have a lien or levy. Currently, it is not easy to get the IRS to lift a lien. The whole process is very difficult to deal with. Wong asked what types of cases Warren’s office works on.

ACTION: Delzer to send TAS issue report to members of Area 5.

Amended returns, Form 1040X, are still high up on the list. Part of the problem is that there are a limited number of tax examiners and sometimes the cases sit for a while before an examiner can work it. Warren thinks that the 1040X may show up in the next NTA Report to Congress. She has been doing a study on amended return processing as they have been such a problem.

Adams explained that each LTA has a portfolio, which are various issues identified from SAMS. Adams’ portfolio is backup withholding. She is the “go to person” for this issue. She is currently researching to



see how big a problem it is. Delzer can look at the portfolio list to see which LTA is working the issue. TAS wants TAP to weigh all input.

Wong asked how TAS gets the word out about themselves to let people know they are out there to help. McQuin replied there is an advertising agency hired to prepare literature. A primary focus for TAS is to let people know they are there. Their inventories have been climbing. The word is getting out that TAS is there to help.

Colvin asked if TAS offers forms 911 when they do outreaches. Form 911 is a Taxpayer Advocate form that a taxpayer can fill out and request relief. They can list the problems they have encountered with the IRS and ask for a recommended solution. TAS will work a case for a taxpayer anyway they are contacted. The important thing is that we get the information so we can help the taxpayer. About 70% of the taxpayers receive relief; the other 30% do not receive the relief they request due to statutory restrictions. Warren said when he does an outreach, he would try to invite a TAP member to go with him, but if nobody can go, he will talk about TAP.

Outreach Reports / Communication Strategy

McQuin reminded TAP members to send outreach information to Delzer whenever you do an outreach. We really need to capture this information so the events can be rolled up into the annual report. As Coston continues to develop measures, it is important to identify how many people TAP has contacted. You have all talked to the LTA in your state and they can help you identify outreaches. We do have money available for you to do outreach. Be sure to contact us in the office before you travel for outreach. It would be best if you contact us several days in advance or even a couple weeks in advance.

It is important to set goals. You need to determine if you want them to be individual or group goals. Last year Area 5 decided on fifteen outreaches for each member per year. This may be easier for some to do than others. Delzer reminded members she can put together an individual introductory kit if you would like one.

ACTION: Delzer will send out the cover letter used in the introductory kit via email to committee members.

Stieger mentioned contacting his legislative representatives. They have mini town hall meetings that are usually open to the public. McQuin said any that you can identify would be good. Bland asked how you keep track of the individual people you speak to. Delzer said you could report each contact.

Rivera said he would like to see the success stories that apply to basic taxpayers. Some of the success stories deal with issues not every taxpayer would understand.

ACTION: Delzer to check with Communication Committee to see if they have updated success stories for outreach.

Colvin said it's good to set individual goals to hold all accountable. There is a PowerPoint presentation that can be used which can be individualized by Delzer. If you have any questions or want something tailored to you, please contact the office

ACTION: Delzer will send Wong the Outreach Workshop information.

Stieger suggested one a month. There are different ways to do outreach other than speaking to groups. You can do a letter to the editor and send it to your local paper.



ACTION: Delzer to forward to Communications Committee the possibility of having TAP pencils printed up to hand out at outreaches.

The committee members decided that the individual goal would be one each month. There are six months left this year, so each member committed to do six outreaches by the end of the year. Please remember to send in your outreach report.

Subcommittee Work

All actions due before the next meeting, June 13, 2006

- Forms and Pubs Training – setting up conference call with Forms and Pubs people
- Toll free – contact Intuit for call model; call routing for “211”
- POA – will prepare a draft write up
- Free File – Draft due 6/9/06

Office Report

McQuin is looking for Panel Members to help with interviews the week of June 19. Interview panel will be a Panel member, a LTA, and a Manager. We should be able to complete all the interviews in one week. All the managers are coming into Milwaukee next week to rank all the applications. Each manager will rank the applicants in their own Area. Will send out the application package before the interview, so you know what questions will be asked. It will explain the whole interview process.

ACTION: Panel members available to do interviews the week of June 19 to email McQuin their availability.

The next town hall meeting is being hosted by Area 4 on June 6 in Cincinnati. This is the last one this year, but the NTA is interested in continuing this effort next year.

The IRS has tax forums throughout the country every year, but TAP will not be attending this year. Partly because we did the town hall meetings, but also because the feedback from panel members was that the issues we get from the tax forums are seldom TAP issues. They are usually practitioner issues. We are getting a lot more out of the town hall meetings.

Closing and Assessment

Landauer-- encouraged everyone not to get discouraged. Don't worry about the technical issues. Don't be afraid to speak up even if you are not a practitioner. If you really feel you have something that is important, be a pest.

Bland – very informative

Guthmann – enjoyed meeting Joe Warren. Was interested to hear the way they talked about the IRS, as like they were separate.

Colvin – feel like I'm getting a better sense of TAP and what we can and cannot do.

Wong – we have an opportunity to make an impact even though we are around for a short time.

Suther – Delzer can give so much information and we don't use her as much as we should. While we are TAP members, we are also taxpayers. We need to find ways to help the taxpayers pay their taxes.

McQuin – all of us that work for the IRS get so used to processes; we forget that you don't have the same knowledge.



Adams – we do refer to the IRS as a separate entity. We became an independent organization within the IRS in 1998 as a result of the Revenue Reconciliation Act. I've been with the IRS for over 30 years, and would be happy to offer my assistance anytime I can help you.

McQuin – Marian can give you all the TAS information because we at TAP do not keep up.

McQuin agrees with Wong, things do move very slowly. If you don't see an impact while you are still a member you have still been effective. It can take years for your recommendations to be implemented.

Stieger – feel more comfortable as a member now. The face-to-face gives us a better chance to interface with each other. I feel better about being able to make an impact.

McQuin asked Colvin and Stieger if they thought that applicants could not make the annual meeting, should they still be considered for membership. They both responded that they did get that impression. The problem this year was the date of the annual meeting changed. Delzer did a very good job of doing orientation on the phone. Stieger doesn't know if face-to-face orientation would be as beneficial because you would not be able to meet the rest of the panel members. Colvin suggested inviting new members who cannot make the annual meeting to the next scheduled face-to-face meeting and do orientation there.

Rivera thanked everyone for their time and input. He also thanked Howard Guthmann for his hospitality.

Meeting adjourned.



**Area 5 Committee Meeting Minutes
May 9, 2006**

Designated Federal Official:

- Marian Adams, Local Taxpayer Advocate

Committee Members Present (These attendees count for quorum)

- Howard Guthmann, St. Paul, MN
- Steve Landauer, Davenport, IA
- Ralph Rivera, Garland, TX (Acting Chair)
- Richard Rousseau, Killeen, TX
- Lee Stieger, Leavenworth, KS
- Mary Suther, Dallas, TX
- Warren Wong, Rochester, MN

Committee Members Absent

- Sandra Bland, Bemidji, MN
- Elizabeth Colvin, Austin, TX
- Clif McKenzie, Del City, OK
- Bob Meyers, Omaha, NE

TAP Staff

- Sandy McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors:

- Bernie Coston, TAP Director
- Cecilia Scott, LTA, Oklahoma City
- Steve Bankler

Welcome / Introductions - McKenzie

Quorum met

Minor changes were made to the agenda and agreed to by all.

Approval of Minutes

Minutes from the meeting of April 11, 2006, were approved by consensus.

Joint Committee Report

Five TAP members met with Commissioner Everson: Larry Combs, Paul Brubaker, Paul Duquette, Dorothy Havey, and Sonny Kasturi. Also attending the meeting were Christopher Lee, Mark Matthews, and Bernie Coston. Subjects discussed were 7216 regulations, return preparer regulation, IRS use of private collection agencies, the direction of VITA/TCE and the availability of free file for taxpayers.



The Commissioner is looking for position papers from TAP on these five issues. Some of these issues have already been elevated, so we will need to look at that information. Since the issues may have changed somewhat, TAP will need to get input and rewrite the issue papers and with current information. Area 4 will be looking at direction of VITA/TCE. Area 5 was assigned the free file issue. This will be discussed further at the face-to-face meeting in St. Paul.

The Commissioner asked for further clarification of the differences between TAP and TAS. The TAP Chair will begin to prepare a quarterly report, and this will help him see the distinction between the two. A timeline will be prepared for these issue referrals and Combs will be preparing this to distribute to everyone.

Meet the LTA – Oklahoma City – Cecilia Scott

Scott thanked the TAP members for opportunity to be on call and talked about her program. She has been in the Service for almost 25 years; being an Revenue Officer, Chief Taxpayer Service in Oklahoma City, Public Affairs Officer, and in the prior Problem Resolution Office.

The employees in her TAS office have an average of 20 years of experience. Of the 14 employees, 8 do casework on a daily basis. The most frequent issues seen have to do with levies. This trend will probably continue because IRS has stepped up enforced collection actions. Other commonly seen issues include amended returns, audit reconsiderations, hardship refund requests, and injured spouse claims. As far as her portfolio work, she is working on a team looking at IRS response to disasters.

Issue Discussion

- Training for Forms/Pubs Employees – Landauer
Information was received from Sharon Patton of Tax Forms and Publications. She acknowledges that they don't have anyone trained in writing. Looking to research how other organizations handle their technical writing. We may be able to collect best practices from others like the University of Iowa. Subcommittee work can be done at the face to face meeting.
- Efile emphasis/ taxpayer rights – Rivera
Subcommittee made recommendations regarding the disposition of some of the e-file issues on the database. The e-file sub committee will need to take the lead on the report for the Commissioner. McQuin reiterated that this is on a fast track, so will probably need more members on this sub committee. May even have to go outside the area committee. Rivera stated that everyone should consider the issue and write down their thoughts. Good to get as much input as possible.

McQuin committed that staff will pull together all prior information and bring it to the face-to-face. Area 5 should look at comments about free file this year and what the NTA has said about Free-file.

Coston stated that TAP should look at the filing threshold and determine the stand for TAP to take.

McQuin reminded the committee that they are representing taxpayers. You need to bring that information to the table. What direction do you recommend this area go?

Bankler added that according to IRS statistics, 60% of returns are prepared by tax preparers. I would guess that has correlation. IRS had major incentives for preparers to Efile. Maybe IRS needs incentives for taxpayers to Efile.



- POA Issues – Rousseau
Recommendation sent in 2004, now has a response dated 4/26/06, IRS is not in favor of the proposal TAP made. Subcommittee needs to discuss further and determine future work. Response explains the IRS position on “check the box” and what it’s for and what it can’t do. We need to look at all the information and determine if we want to continue working.
- Voice mail on toll free – Guthmann
Written recommendation has been prepared. We are having a conference call this afternoon. Will have more info to report on at the face to face meeting.
- Issue review – Guthmann
Went through issues and prioritized. Delzer sent an email summary on 4/27. Will be discussed at face to face.

Action item review

All action items were completed. Survey information sent out as requested by Wong. Results are based on key questions, that is why when you look at the results, some questions are missing. This survey is for TAS only.

Outreach

Rousseau did an outreach at Fort Hood VITA Center. He prepared an excellent outreach report.

Office Report

Delzer sent out the new business cards for all members.

Coston shared that recruitment ended on 4/28 and we received over 758 online applications. The week of 5/30 staff will be meeting in Milwaukee to rank all the applications. Next step will be the interviews. We are on target to submit our nominations in an August/September timeframe.

For all the states in Area 5, we have enough applications that we should be able to get the cream of the crop like we have now. They will come to training and orientation December 12-15, 2006.

Face-to-face meeting: All travel has been done. If you haven’t received travel information, or have agenda items, please contact the office. We can have TAPSpeak available and Delzer can help you one on one if you want.

Milwaukee staff is now in the new office, so please be aware of the new contact information.

Public input

Bankler questioned why he only received the agenda and outreach report. He did not receive the reports or surveys that were sent out.

Meeting adjourned.



Area 5 Committee Meeting Minutes April 11, 2006

Designated Federal Official:

- Marian Adams, Local Taxpayer Advocate

Committee Members Present (These attendees count for quorum)

- Sandra Bland, Bemidji, MN
- Elizabeth Colvin, Austin, TX
- Howard Guthmann, St. Paul, MN
- Clif McKenzie, Del City, OK
- Bob Meyers, Omaha, NE
- Ralph Rivera, Garland, TX
- Richard Rousseau, Killeen, TX
- Warren Wong, Rochester, MN

Committee Members Absent

- Steve Landauer, Davenport, IA
- Lee Stieger, Leavenworth, KS
- Mary Suther, Dallas, TX

TAP Staff

- Sandy McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors:

- Bernie Coston, TAP Director
- Joe Zelle, LTA, St. Louis

Welcome / Introductions - McKenzie

McKenzie welcomed everyone. He announced that he would have to leave the call early so Ralph Rivera will finish conducting the meeting.

Joint Committee Report

The annual meeting is scheduled for the week of December 11, 2006, in Washington, D.C. It will be held in the Grand Hyatt, which is the same hotel as last year's annual meeting.

Recruitment is in full swing. As of April 5, there were 272 applications in final status and 921 in draft status. Coston indicated that email reminders will be sent out to those whose applications are still in draft to remind them to complete them. McQuin said we are looking for panel members to help interview the applicants after the ranking is complete.

The annual report is complete and has been sent to the printer. Three more town hall meetings are scheduled.



Six members of the Joint Committee are meeting with the Commissioner on April 20. If you have something you want the Joint Committee to talk about, please send it to McQuin. She will forward it to them.

Approval of Minutes

Minutes were approved by consensus.

Meet the LTA – St. Louis – Joe Zelle

Zelle has been the Local Taxpayer Advocate for 4 _ yrs. He has been with IRS for over 24 years. There are 22 case advocates in the St. Louis office working about 950 cases at the moment. There is also a toll free call site in St. Louis that employees 700 people. The office received about 8,500 new cases last year from them. They determine if the cases meet Taxpayer Advocate criteria. Right now, most of the cases are requests for expedite refunds.

His advocacy portfolio is Tax Avoidance Transactions. Each local taxpayer advocate has different experience so the National Taxpayer Advocate Nina Olson tries to assign advocacy portfolios in their areas of expertise or in programs they have an interest in. Joe has expertise in tax shelters, so that is his portfolio. He reviews new manual sections written on various schemes and ensures taxpayer rights are being protected.

In addition, each LTA’s office is responsible for an outreach plan which targets specific populations.

Wong asked whether TAS has a system of measures. Zelle explained that TAS contracts with the Gallop Organization to conduct customer satisfaction surveys. Case work is also evaluated with various quality standards.

ACTION: Delzer will research the customer satisfaction survey to determine what information can be shared with TAP.

Issue Discussion--McKenzie

Thirty-one issues were identified at the town hall meeting. The best way to discuss this many items is for a subcommittee to prioritize. Some of the issues are very similar in nature and could be combined. We probably can only work on three issues at one time. Howard, Sandy B, and Ralph agreed to work on the issue list.

The committee may also want to close some of the issues in the parking lot since they have been there a very long time.

Sub committee for Issue Review: Guthmann / Bland / Rivera

ACTION: Delzer will send the Issue Review subcommittee the current new/ parking lot list. Delzer will set up a conference call at the subcommittee’s convenience.

Training for Forms/Pubs Employees – Bob Meyers

The subcommittee has not met yet.

E-file Emphasis/Taxpayer Rights – Ralph Rivera

The subcommittee met and had a good discussion. We are following up on some information and hope to have more to report at the next meeting.

Power of Attorney (POA) Issues – Rick Rousseau

Similar issues were elevated over a year ago but the IRS has not responded . We will informally track it down. If we don’t get a response, we will send our concerns to the Joint Committee.



McQuin said initially this issue was sent to the wrong IRS area. McQuin said this particular issue went outside the normal organizations we work with and have an agreement with. Coston followed up and the issue is with the right person now. McQuin will speak to Coston this week to determine when we will make further contact about this issue.

Guthmann suggested TAP's concerns about prompt response should be presented to the Commissioner next week.

Voice Mail on the Toll-free – Howard Guthmann

Guthmann sent out his write-up via email for comments. McQuin pointed out that when these recommendations are sent forward, barriers need to be identified and included with the recommendation. If we don't address them up front, IRS will have an easy out by just identifying the barriers. In this recommendation, they could say it would be too expensive to change the equipment for the system, so as a counter measure, we could identify the cost savings to offset the expense. Guthmann said he has not received feedback from anyone in Area 5 on his write-up. TAP uses voice mail on their toll free system; why can't they use it on the IRS toll free line? Coston recommended that Area 5 invite someone from the toll free site (subject matter expert) to help with additional research.

Meyers asked how the toll free calls get directed. Are they routed to specific people? Can a taxpayer press a number to get to a specialist? Guthmann indicated he would like to discuss this and other issues with a subject matter expert. Taxpayers should be able to speak to the same person every time they call. Rivera suggested forming a subcommittee to work this issue.

ACTION: Delzer will do further research on the toll free voice mail issues; reports about volume, wait time, hang-ups, busy signals, routing, staffing, and will arrange for Guthmann to talk to a center supervisor.

Outreach Commitment – McQuin

McQuin reiterated that Area 5 members decided to make individual commitments last year. They felt they needed to set a goal. Outreach opportunities can be one on one and do not have to be to a large group. Each member should contact their LTA and work with them to help identify outreaches. Who has not spoken to their LTA yet?

Bland – yes, has been in touch by email – he is retiring now though

Colvin – yes, have worked together

Guthmann – yes, talked and worked with office

McKenzie – yes

Meyers- just met with them last week. Has already been invited to one outreach that he cannot attend, but will be looking for other opportunities

Rivera – put a call into her but has not gotten a call back

Rousseau – emailed and am trying to get together with her. Would like to meet with Colvin while down there

Wong – if an LTA is leaving, why can't we work with someone else in the office until their replacement is chosen?



Rivera noted that the outreach commitment will be decided at the face-to-face meeting next month in St. Paul.

Office Report - McQuin

The Milwaukee office is moving next week. The new phone numbers and address will be sent out next week. However, if you call the old number you will be forwarded to the new number for the next 90 days.

Business cards were ordered and should be out very soon.

The face-to-face meeting will actually be in Guthmann's office. The Crown Plaza Riverfront is the hotel (it used to be the Radisson City Center Hotel).

Robb will be contacting you the last week of April for travel information.

Public Input

None.

Closing / Assessment

Good meeting.

Meeting adjourned



Area 5 Committee Meeting Minutes March 14, 2006

Designated Federal Official:

- Marian Adams, Local Taxpayer Advocate, Wichita, TX

Committee Members Present

- Sandra Bland, Bemidji, MN
- Howard Guthmann, St. Paul, MN
- Steve Landauer, Davenport, IA
- Clif McKenzie, Del City, OK
- Bob Meyers, Omaha, NE
- Ralph Rivera, Garland, TX
- Rick Rousseau, Killeen, TX
- Lee Stieger, Leavenworth, KS
- Mary Suther, Dallas, TX
- Warren Wong, Rochester, MN

Committee Members Absent

- Elizabeth Colvin, Austin, TX
- Charles Wendt, Iola, TX

TAP Staff

- Sandy McQuin, TAP Manager
- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors

- Bernie Coston, Director, Taxpayer Advocacy Panel
- Rick Polson, Local Taxpayer Advocate, Des Moines, IA
- Steve Bankler

Welcome / Introductions - McKenzie

McKenzie welcomed everyone to the meeting. The new charter was signed and is in effect. Coston sent out an email message asking members if they would like to extend from two years to three years.

Any issues identified during the Davenport Town Hall meeting will be added to the database and presented to the Area 5 Committee at the next conference call.



Area 5 Chair Report

- **Approval of Minutes** – February 14, 2006, minutes were approved by consensus.
- **Joint Committee Report** – TAP Chair Larry Combs is still working on setting up a date for the TAP meeting with the Commissioner. If you have any issues you would like to see addressed, please forward them to McKenzie. Issues elevated to the Joint Committee for approval will be held for an extra 30 days to be reviewed for format, grammar, and content by a sub committee appointed by the Joint Committee.

Town Hall Meeting Update - Landauer

Steve Landauer reported that there were 45 people who attended the Town Hall Meeting in Davenport, IA, on March 8, 2006. He used his contacts to get the word out. McQuin pointed out that it was good to have a panel member in the same city where the meeting is being held. They have contacts to increase attendance and input. This was a very, very good meeting and very successful. Coston echoed McQuin. He thanked Landauer for his opening comments at the meeting. This was not supposed to be a media event; it was a TAP / TAS outreach event. Bob Meyers commented that it was a good thing to open the meeting at the end for comments. We got good input during the meeting as well as from the focus group. We heard the bad, but we also heard good comments. McQuin noted there was a lot of activity after the meeting ended. Many people stayed and spoke to the Local Taxpayer Advocates (LTA) and Deputy National Taxpayer Advocate Chris Wagner. Des Moines LTA Rick Polson said this meeting had a different dynamic than the Philadelphia town hall meeting. He was pleased at the turnout; especially considering the foul weather. Warren Wong asked about the objectives of the town hall meetings. Coston responded that overall, it is to solicit input from taxpayers about customer service. We can do that through the town hall meetings and the focus group. We handed out surveys at the end of the town hall and got some issues through them.

Landauer said it is very important to open the meetings up at the end for comments and issues from the attendees. If you don't open it up, it's not really a town hall meeting, and that is why they come. Coston pointed out that the meeting needs some structure. We generally have to rent the room where the meeting is being held and we usually have to pay by the hour. Not to mention we have to let them know how long we intend to use the room.

Meet the LTA – Iowa

Rick Polson thanked the TAP members for their service, and stated he appreciated the effort put into the town hall meetings. He invited everyone to call him if they need assistance, he is available.

Training form Forms/Pubs/ Employees - Meyers

There is nothing to report at this time.

E-File Emphasis / Taxpayer Rights – Rivera

Rivera asked for more direction for this subcommittee. McQuin and Delzer will arrange to talk with him, to explain how they can provide support. If you need a template on how to proceed, look in the TAP Member Handbook. Remember that Delzer can set up conference calls for the subcommittees.

ACTION: Delzer will re-send the subcommittee member list

Power of Attorney (POA) Issues – Rousseau

Rousseau reported that they have just started working on these issues. They did some research and found out that part of this issue has already been addressed by the panel. A recommendation has



already been elevated but the subcommittee feels it is still an issue and they want to pursue it. Guthmann noted that the issue was elevated to the IRS, however a response has never been received.

ACTION: McQuin will speak to Coston about following up on the previous POA issues.

Voice Mail on Toll Free – Guthmann

Guthmann will write the recommendation up and forward to Delzer.

ACTION: Any new issues identified should be sent to Delzer via email. She will add them to the database and a new issue report will be sent out before the April conference call.

ACTION Item Review – Delzer

All action items from the February meeting were completed.

Outreach Commitment – McQuin

It was recommended that a subcommittee be formed to determine how the committee would handle outreaches. The staff will help you, but you need to set your own goals. Warren Wong suggested that each person commit to nine outreaches; one for each month left until the annual meeting.

ACTION: McQuin will send out the Area 5 outreach commitment from last year as an example.

Office Report – McQuin

The face-to-face meeting is going to be in St. Paul, MN. All will travel to St. Paul on Sunday, May 21, meet all day Monday, May 22 and until noon on Tuesday, May 23, return home the afternoon or evening of May 23. The meeting will be held in Howard Guthmann's office. You will be staying at the City Center Hotel (Crowne Plaza). Robb will be contacting you regarding your travel.

Recruitment begins on Tuesday, March 21 and runs through Friday, April 28. The application will be available on the TAP website. We will be sending you information and asking you to help get the word out. We will be doing interviews this summer and will be asking for your help here again. It seems like some of you just became panel members and this is too soon, but this is a long process. We will be looking to you to help identify stakeholders. We will let you know in which states we are looking for people.

Public Input

Steve Bankler – two things: 1) has said it before but why does the public have to wait until the end of the meeting to speak. Public participants should be asked for input in the beginning of the meeting and should be allowed to speak during the meeting.

2) you cannot use e-services if you don't have a Power of Attorney (POA) for a taxpayer. IRS has changed the policy and will not take information from a practitioner without a POA. IRS isn't disclosing anything so what is the problem. Many things could be fixed so simply this way.

Next meeting, April 11, 9:30 CT.



Area 5 Committee Meeting Minutes February 14, 2006

Designated Federal Official:

- Sandy McQuin, TAP Manager

Committee Members Present

- Sandra Bland, Bemidji, MN
- Howard Guthmann, St. Paul, MN
- Clif McKenzie, Del City, OK
- Bob Meyers, Omaha, NE
- Ralph Rivera, Garland, TX
- Richard Rousseau, Killeen, TX
- Lee Stieger, Leavenworth, KS
- Mary Suther, Dallas, TX
- Warren Wong, Rochester, MN

Committee Members Absent:

- Elizabeth Colvin, Austin, TX
- Steve Landauer, Davenport, IA
- Charles Wendt, Iola, TX

TAP Staff:

- Mary Ann Delzer, Program Analyst
- Patti Robb, Secretary

Visitors:

- Steve Bankler

Welcome / Introductions - McKenzie

McKenzie welcomed everyone to the meeting. No changes made to the agenda. Please identify yourself when speaking.

Area 5 Chair Report

- **Approval of Minutes** – Minutes were approved by consensus.
- **Joint Committee Report** – Chairs had a training session in San Diego that was very beneficial. Meyers agreed, having attended as chair of the Communication Committee, that the training was very helpful for all the new chairs.

Town Hall Meeting Update

The town hall meeting is scheduled for March 8, in Davenport, IA. Everyone involved (Mary Ann Delzer, IRS Media, LTAs, Sandy McQuin, and Steve Landauer) have been working very hard to get the word out in the Quad Cities area. The press has been excellent and we have had good responses, a nice article in the newspaper and a TV calendar item. Delzer has been doing a wonderful job sending



out letters and notices to targeted groups. We have had interest from a member of the Oversight Board who lives in Iowa, college professors, as well as Senator Grassley's office.

ACTION: Delzer will send out town hall information to everyone on the committee. Please share this information with any interested parties.

Power of Attorney (POA) authority limits

Need to look at POA issues elevated in '04 and '05 first to see what they addressed and what the responses were.

McQuin suggested that the subcommittees meet before discussing the issues on the Area 5 teleconference. Better to work the issue during a subcommittee call.

ACTION: Delzer will send out a list of the active issues and members already assigned to the subcommittees. The remaining members can choose which issue they would like to work on.

Forms and Publications –employee training

- Bob Meyers, chair
- Steve Landauer

E-file Emphasis too strong

- Ralph Rivera, chair
- Clif McKenzie
- Lee Stieger

Power of Attorney (POA) authority limits

- Rick Rousseau, chair
- Mary Suther
- Howard Guthmann

Toll Free voice mail

- Howard Guthmann, chair

Once the subcommittee members have been decided, conference calls can be set up and discussions can identify exactly what the subcommittee wants to look at. As meetings are you identify areas, if you decide not to look at that issue, you can drop it and choose another issue.

Action Item Review

McQuin researched and determined that the education credit phase-out is a legislative issue.

Outreach Commitment

McQuin suggested committee members determine a goal, either as individuals or as an area. As an example, McKenzie said last year he had committed to doing 15 outreaches individually. He suggested that each member contact their LTA to talk about outreach opportunities. They have Congressional liaison meetings every year and you may be able to get involved.

ACTION: Delzer will send each member the individual press releases she sent to the IRS media specialists. You in turn can forward them to special groups on your own. You may want to add the names of other committee members in your state to the release.

ACTION: Each committee member should think about their outreach commitment and be



ready to discuss at the meeting in March.

ACTION: McQuin will email committee members a template for members to use when setting their outreach goals.

Office Report

Everyone should have received their telephone calling card by now. If you have not received it, please let us know.

Patti Robb did estimates on the face-to-face meeting locations for the three cities identified: Kansas City, Minneapolis, and San Antonio. Minneapolis came in with the lowest cost. The meeting dates selected (by email) are May 21-23, 2006.

The annual meeting date still has not been decided. An email was sent out to everyone to get their input. If the meeting was held in November, it may not be in Washington, DC, as it is very difficult to get hotel rooms that time of year. If it is not in Washington, DC, it could mean fewer IRS executives could attend. If January is selected, it could be held in DC as room availability is good before Congress resumes.

Public Input

None

Closing / Assessment

Meeting went very well. Members stayed on focus and most participated.

Meeting adjourned.

ACTION ITEMS:

MCQUIN

- **McQuin will email committee members a template for members to use when setting their outreach goals.**

DELZER

- **Delzer will send out town hall information to everyone on the committee. Please share this information with any interested parties.**
- **Delzer will send out a list of the active issues and members already assigned to the subcommittees. The remaining members can choose which issue they would like to work on.**
- **Delzer will send each member the individual press releases she sent to the IRS media specialists.**

PANEL MEMBERS

- **Each committee member should think about their outreach commitment and be ready to discuss at the meeting in March.**



Subcommittees

Forms and Publications –employee training

- Bob Meyers, chair
- Steve Landauer

E-file Emphasis too strong

- Ralph Rivera, chair
- Clif McKenzie
- Lee Stieger

Power of Attorney (POA) authority limits

- Rick Rousseau, chair
- Mary Suther
- Howard Guthmann

Toll Free voice mail

- Howard Guthmann, chair

Still to choose a subcommittee:

- Sandra Bland
- Elizabeth Colvin
- Charles Wendt
- Warren Wong